



Hocking Hills
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DESTINATION STEWARDSHIP PLAN

Striving for Balance





Executive Summary

The majestic beauty and ample recreational offerings of the Hocking Hills attract millions of visitors each year who in turn generate economic impacts for Hocking County. Growth in leisure visitor volume combined with increased demand for short-term rental investments tarnished community feelings about visitors and the costs connected with the area's robust tourism industry.

The Hocking Hills Tourism Association began working on various destination stewardship initiatives prior to 2020, but the heightened challenges following the pandemic necessitated a comprehensive destination stewardship plan.

Work on the Hocking Hills Stewardship Plan began in October 2023. The planning process included the following steps:

- Assessment of the region's product mix;
- Analysis of visitation patterns;
- Calculations of visitor-to-resident ratios and overall capacity;
- Conversations with 19 people through one-on-one interviews, over 80 attendees to small group stakeholder sessions, and over 75 resident town hall attendees;
- Both a stakeholder survey and a resident survey;
- Comparative analysis of similar destinations; and
- An analysis of destination stewardship-related strengths, weaknesses, opportunities, and threats.

The outcome of this process resulted in recommendations designed to support and elevate one core value:

The Hocking Hills Tourism Association cares deeply about the Hocking Hills and how the health of the local tourism industry impacts the future of our residents, environment, and economy.

Key recommendations of the Hocking Hills Destination Stewardship Plan include:

- Facilitating the formation of a community-wide Stewardship Collaborative to help pursue and communicate destination stewardship priorities
- Encouraging respectful visitor behaviors through:
 - Continuing to market for overnight visitors
 - Informing and educating day trippers
 - Encouraging visitor use of shuttling
 - Inspiring visitors to disperse to alternate options
- Convening collaborative engagements by facilitating interaction across community organizations
- Presenting the value of tourism by building an understanding of tourism's role and impact

As the Columbus area continues to prepare for the staggering growth that Intel and other economic development initiatives will bring, this destination stewardship plan for the Hocking Hills becomes even more important. Growth in visitation is imminent, so this plan is vital to the future of the Hocking Hills.

Purposeful Planning

***Ensuring the Hocking Hills are
protected and preserved for
generations to come.***

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Introduction

The US Travel Association defines a “person trip” as travel “by one person of 50 miles or more, one way, away from home or including one or more nights away from home.” Based on this definition, most residents of the Columbus, Ohio, metro area would only be considered “trip takers” to Ohio’s Hocking Hills if they spent a night while visiting. Distance traveled and definitions matter little to a community that feels overwhelmed by visitation. The feeling of too much visitation is a common sentiment throughout Hocking County as the area struggles to react to the popularity and volume of leisure activity growth endured since the pandemic.

The Hocking Hills Tourism Association recognized the importance of building upon past work on visitor management to help address the community’s challenges with visitation trends of the past four years. This Destination Stewardship Plan was commissioned for the following reasons:

- To provide a clear understanding of the visitation patterns taking place; and
- To provide the community and the tourism industry with recommendations that help address the balance among the desires of overnight guests and day trippers, the needs of the Hocking Hills business community, and the expectations of local residents.

This plan seeks to provide a better path forward for the Hocking Hills through destination stewardship.



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Mission :

The mission of the Hocking Hills Tourism Association is to promote the growth of responsible tourism through marketing strategies and programs that balance economic growth with the need to preserve the natural and cultural heritage in the Hocking Hills Region.

Vision:

The unique destination that is Ohio's Hocking Hills is cherished and respected by the residents that live here, the visitors that play here, and businesses they support.

Acknowledgement:

Clarity of Place would like to thank the numerous individuals and organizations who took time out of their schedules to provide insights and context for this plan. The individuals who actively participated in the planning process—either by participating in one of the workshops, giving their time for an interview, and/or providing data and other contextual materials—are noted in the Appendix.

Additionally, the project team would like to thank the leadership of the staff and Board of Directors from the Hocking Hills Tourism Association. Their guidance and input were integral in understanding the current state and ambitions of the Hocking Hills area, the role and importance of tourism within the region, and the challenges faced going forward.

The Importance of Destination Stewardship

For over a century, tourism has played an important role in the lives and livelihood of Hocking Hills residents. The lifestyle and travel trends following the 2020 pandemic dramatically changed that role. The increased volume of leisure visitors, combined with increased demand for short-term rental investment real estate, challenged how this rural community views tourism.

Even prior to the pandemic, the Hocking Hills Tourism Association began shifting some of its marketing from traditional growth-focused outreach to more visitor management and destination stewardship practices. New programs and partnerships with organizations such as Leave No Trace were initiated to help express desired visitor behaviors.

Several issues are components of destination stewardship within the Hocking Hills:

- Affordability of real estate and workforce housing
- Ease of mobility and access for public safety
- Trash and waste disposal practices
- Care of natural resources
- Trespassing and infringement on private property
- Consistent and sustainable year-round employment
- Lack of a diverse local economy
- Encouraging community engagement and participation
- Cellular phone coverage area
- Land use policies and regulations
- Public land management policies and protocols

These issues cannot and will not be resolved by a single organization. Addressing these issues will require a collaborative commitment to problem solving through destination stewardship.

LOVE HOCKING HILLS VISIT RESPONSIBLY

Hey there, nature enthusiasts and wanderers alike! If you're planning a trip to the picturesque Hocking Hills in Ohio, you're in for a treat. The lush greenery, stunning waterfalls, and trails that seem straight out of a fairy tale await you. But here's the deal: we're playing the ultimate game of hide-and-seek with nature, and the rule is simple - leave no trace!

Now, I know what you're thinking. "Leave no trace? But I'm not a ninja!" Fear not, fellow adventurers, it's all about embracing your adventurous spirit and enjoying nature while ensuring you don't leave any unwanted footprints (literally and figuratively). So, grab your backpack, and let's dive into the guide to enjoying Hocking Hills without leaving a trace.



by hcxplores

Trekking, Not Collecting

Every leaf is a piece of art, and every rock seems like the coolest addition to your rock collection back home. But remember, the magic lies in leaving these treasures untouched. Admire them, photograph them, but let them be where they belong - in their natural habitat.



Ghost Mode: Garbage Edition

Here's the golden rule: whatever comes with you into the woods should leave with you. Wrappers, bottles, cans - they don't belong to this enchanted forest. So, channel your inner cleanliness guru and leave nothing behind but your footprints (metaphorically, of course).

Glossary of Terms

There are several words and phrases that recur throughout this plan. This glossary is meant to set a common definition of those terms throughout this plan and the work that will follow:

Day trippers: Visitors spending only a portion of a day and not spending the night in the Hocking Hills

Destination Stewardship: Protecting, preserving, and promoting the tourism industry's long-term viability and ensuring the industry has a net-positive impact on its community

Hocking Hills Tourism Association or HHTA: The official destination marketing and management organization that serves Hocking County by helping educate potential and actual overnight guests

Overnight Visitors: Guests to the Hocking Hills who spend a minimum of one night, regardless of the type of lodging used

Property regulations: Laws placed to manage how a property should be used or developed

Stakeholder: Any person, business, or organization that has interest in the destination and receives some benefit from HHTA programming

Sustainability (social/economic/environmental): Ensuring a balance of economic growth, environmental care, and social well-being

Visitor taxes: Taxes imposed directly on the visitors to the Hocking Hills or on the businesses they frequent



Goals of Hocking Hills Destination Stewardship

Destination stewardship goals differ from one community to the next. For the Hocking Hills, there was a simple overarching objective stated for this destination stewardship plan:

To ensure the Hocking Hills are protected and preserved for generations to come.

Over the course of gathering input, analyzing multiple data sources, and studying the needs of this region, more specific goals emerged. Of these goals, some fall directly into the mission and purview of HHTA while others are much broader and require a variety of organizations and entities.

Destination Stewardship Goals for HHTA

Address visitor behavior and impact across the Hocking Hills

Address the importance of generating overnight stays in the Hocking Hills

Address local perceptions of the importance of tourism to the economy of the Hocking Hills

Destination Stewardship Goals beyond HHTA

Manage future growth of short-term rental properties while addressing the need for workforce housing

Manage future need for public safety public safety for both residents and guests of Hocking County

Address congestion and infrastructure strain along roads and trails caused by volume of use in the Hocking Hills natural areas

Continue efforts to diversify the local economy

When combined, the goals translate into three desired outcomes for the implementation of this destination stewardship plan:

Facilitate balanced management of desires of overnight guests and day trippers, the needs of the Hocking Hills business community, and the expectations of local residents

Manage future development of short-term rental supply

Appreciate the positive economic benefits generated by tourism

Background

A Brief History of the Hocking Hills

The forests, streams, and geological features of the Hocking Hills have attracted visitors for over 7,000 years as Indigenous peoples found bountiful hunting in the area. The region's name originated from the description used by the Wyandotte, Delaware, and Shawnee tribes of the area, who called it Hockhocking, their term for "bottle river."¹

As colonial expansion pushed west, the area's population felt turbulence and even violence as Native peoples clashed with new settlers. In 1816, the city of Logan was established and named for the Mingo chief, John Logan. Hocking County became incorporated in 1818.¹

The state of Ohio began assembling holdings of properties containing scenic features in 1924. The initial parcel of 146 acres would over time expand in Hocking County to include the Hocking Hills State Park, Hocking State Forest, three state nature preserves, and a portion of the Wayne National Forest.¹

Over the century that followed, this county within Ohio's Appalachian region endured demonstrative change. In 2004, manufacturing comprised nearly 22% of the employment in Hocking County, with health care/social assistance being second at 13%, retail third (11%), and accommodations/food services fourth. By 2019, the region lost significant manufacturing jobs leaving both accommodations/food services and health care/social assistance as the two top employment sectors at 17%. Manufacturing had dropped to 15%².

Pandemic and beyond...

The Hocking Hills, like so many natural resource-based destinations, changed dramatically following the March 9, 2020, declaration of a State of Emergency in Ohio caused by the growing health crisis of Covid-19³. Unprecedented interest in escaping into the outdoors brought new visitors, overnight stays, and users of the parks to the Hocking Hills.

As these visitors realized the relative affordability and ease of access to the incredible outdoor environment, investments increased in second homes and short-term rental properties. The demand for real estate forced prices up, impacting both affordability for local residents and assessment rates across the county.

Population growth in Columbus added to the impacts within the Hocking Hills as more day trips grew. As Intel and other major economic development projects drive growth within central Ohio, the anticipated 500,000 new residents coming into the area⁴ will potentially bring along significant and continued growth in visitor volume.

Sources: 1) www.columbusmonthly.com/story/news/2009/12/03/a-brief-history-hocking-hills/22826785007/; 2) www.ohiolmi.com/_docs/EconomicProfiles/Hocking-County.pdf; 3) www.governor.ohio.gov/media/executive-orders/executive-order-2020-01-d; 4) www.10tv.com/article/news/local/columbus-leaders-discuss-growth-opportunities-and-challenges/530-f049aeea-665e-4e76-8002-3bd2deb94385

Situational Analysis

Destination Assessment

To provide context from which to build the Destination Stewardship Plan for the Hocking Hills Tourism Association, Clarity of Place assessed Hocking County's destination product and the area's infrastructure.

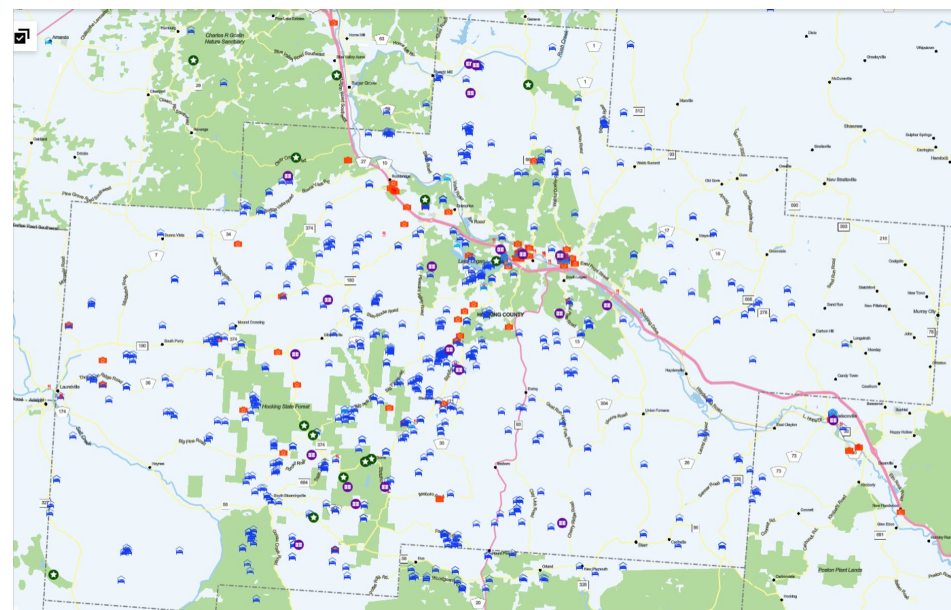
The Destination Assessment provides a snapshot of the county's destination product (including demand drivers) and the civil infrastructure to support visitor activity in the area.

Hospitality Assets

- **Demand Drivers:** Assets and places that provide a reason for or motivation for travelers to visit
- **Attractions and Experiences:** Activities and places that visitors use to enhance/expand their visit
- **Hospitality Industry:** Services and amenities that make a visit enjoyable
- **Infrastructure/Accessibility:** Civil and community infrastructure that services visitors and allows them to get to/from/within the destination.

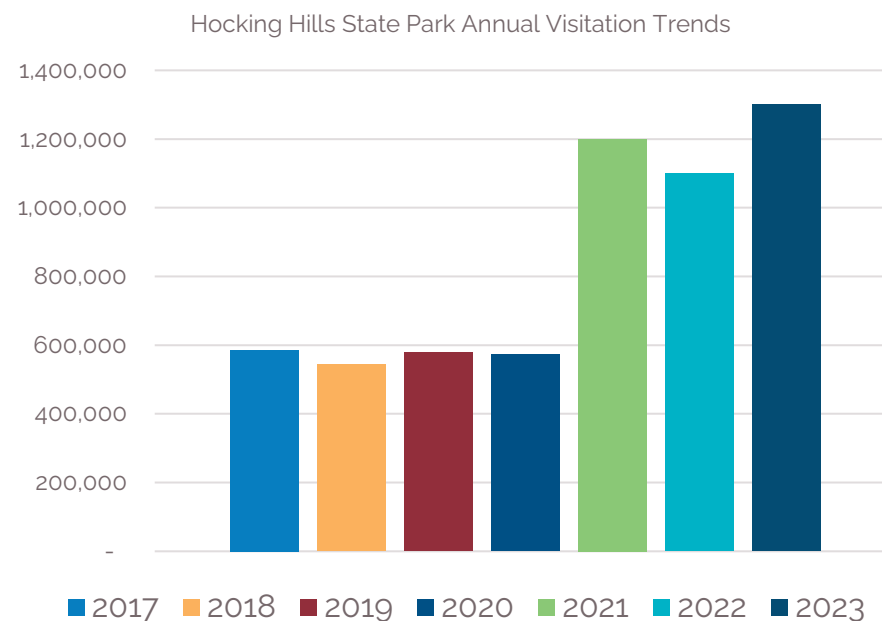
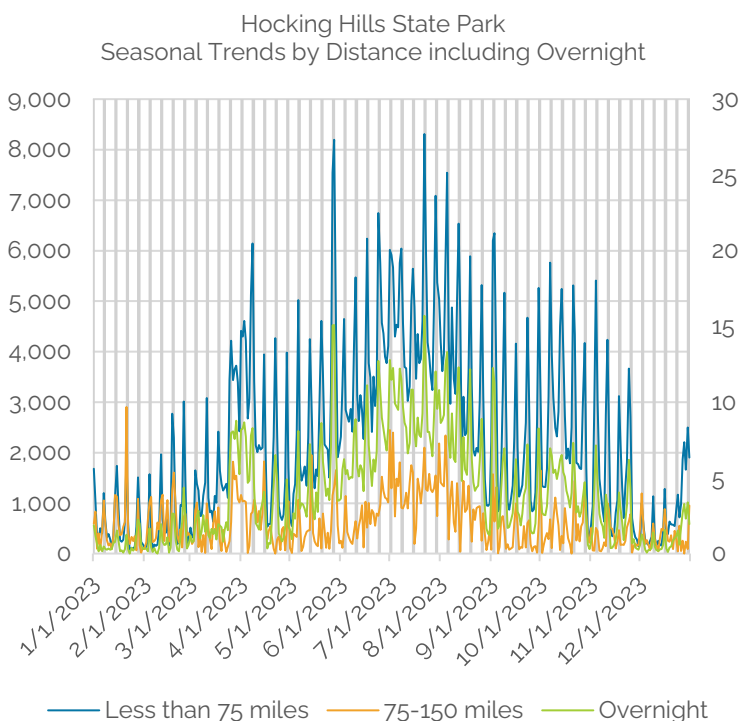
The county's proximity to large, highly urbanized metropolitan areas positions it as a natural base for guests looking to enjoy nature and the unique character of the region. Hocking County reflects the Appalachian region's rich history of coal mining, agriculture, and craftsmanship,

Hocking County's "product" for visitors includes outdoor recreation, family-friendly events and festivals, and opportunities to experience traditional Appalachian music, art, and cuisine. Several towns and villages within the county offer retail, dining, and other visitor services.



Hocking Hills State Park is the predominant demand driver for visitation to the county. Downtown Logan also draws a large share of guests. Tracking visitation to Hocking Hills State Park is difficult due to the multiple access points. There is no entrance fee to enjoy the park; hence, there is no ticketing data. Multiple sources estimate that between 2.2 and 4 million guests visit the Park each year. Geolocation tracking data provide some trends in visitation patterns but highly discounts the true number of visitors given inconsistent cellular coverage.

Nevertheless, to understand the rough breakdown of visitors to Hocking Hills State Park, data from Placer.ai -- a location analytics platform -- was used. While not counting all visitors (given the aforementioned limitation of the data tracking), Placer.ai data suggests that the Hocking Hills State Park welcomed at least 1.3 million visitors in 2023. Visitation trends to Hocking Hills State Park tracked through Placer.ai showed a consistent level of visitation from 2017 to 2020 hovering between a low of 544,000 visits in 2018 to a high of 578,100 in 2019. The 110% jump in visitation from 2020 to 2021 dramatically impacted the area as pandemic related interest in areas of scenic beauty and outdoor recreation brought droves of new users to the park.



Current Initiatives

The Hocking Hills Tourism Association is a high-performing, well-respected destination organization. The programs and services of the HHTA illustrate their commitment to both destination stewardship and community. The organization's 2020-2022 strategic plan included four strategic goals that provide a foundational starting point for the strategies of this Destination Stewardship plan:

Enhanced Sales & Marketing	Expanded Destination Stewardship	Intentional Community Alignment	Strategic Destination Organization
Develop stronger digital strategy for sales & marketing	Advocate for trail extension	Develop member education workshops	Establish a customer advisory board
Continue to promote local events	Support mobile/cellular connectivity expansion	Develop community advocacy tourism campaign	Increase administrative space for organization
Enhance visitor dispersal strategy, including town and other segments	Support the development of bike tourism initiative	Continue to collaborate with downtown partners for product development	Advocate for the development of county-wide land use plan and zoning ordinance
Develop culinary tourism strategies with partners	Advocate for expansion of installing EV charge stations across the county	Create a community-wide volunteer opportunity clearinghouse	Develop long-range capacity overview regarding sustainable tourism
Feature wellness opportunities more prominently	Reengage multi-model transportation discussions	Convene stakeholders to develop a recycling initiative	Continue to evolve resident sentiment survey
	Create new guided tours in Logan and parks	Convene tourism and hospitality workforce development partners	

Through implementation of this strategic plan, the HHTA made several specific programming investments that support the commitment to destination stewardship:

1. Partnering with Leave No Trace to develop a responsible tourism pledge and the visitor management program - Love Hocking Hills
2. Shifting most paid advertising to longer distance markets to focus fully on generating overnight stays
3. Investing in product development to encourage more visitor dispersion
4. Partnering with Logan Public Transit to provide peak season park and ride services from Logan to Hocking Hills State Park
5. Investing in research and data to adequately monitor tourism performance and needs

Community Input – Stakeholders and Residents

An important component of the planning process was a multifaceted approach to obtaining input from stakeholders and residents. The following steps occurred between October 2023 and January 2024 to gather and incorporate feedback, needs and desires of local residents and tourism stakeholders

Interviews

A total of 18 one-on-one interviews were held to help identify key issues facing the community. The input gathered through these initial interviews helped provide context for the small group sessions. The interviews revealed the following:

- An understanding of the economic importance of tourism accompanied by challenges stemming from popularity and growth including:
 - Real estate affordability;
 - Public safety concerns;
 - Maintenance and conditions of roads and trails;
 - Visitor management and behavior; and
 - Overall reliance on tourism for tax generation

Small Group Sessions

On November 7 and 8, 2023 HHTA convened nine small group sessions and two resident town hall sessions to discuss potential challenges and solutions for particular industries or interests.

At the sessions, residents and tourism stakeholders

- Examined the value of tourism in the Hocking Hills.
- Outlined challenges the community is facing from the area's popularity and tourism growth.
- Reviewed solutions that other destinations have pursued and shared their own ideas for solutions in several areas:
 - Visitor patterns
 - Real estate and land use
 - Diversifying the local economy
 - Broadband/Cellular coverage
 - Infrastructure investments
- Learned that these meetings were just the beginning of the conversation, and that the Hocking Hills Tourism Association would like for them to remain involved in shaping the HHTA roadmap for tourism stewardship.



The input gathered helped to guide the development of both a resident and stakeholder survey. An overview of these results is included within the appendix to this plan.

Resident Survey

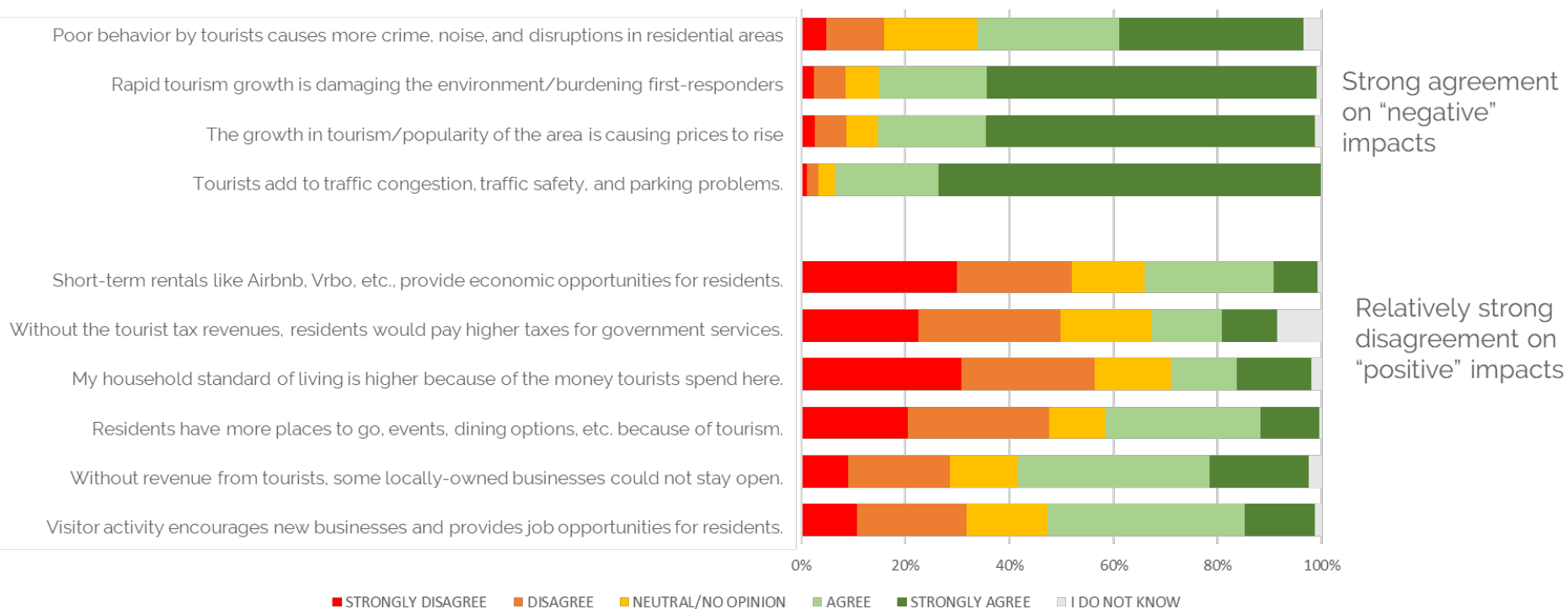
To complement the town hall meetings, Clarity of Place issued a resident survey and encouraged broad participation. The survey was available online and via paper copies.

Like the other feedback streams, residents responding to the survey had mixed reviews of tourism's impact on the community. The majority of respondents tended to agree with the negative impacts of tourism. However, a large percentage of respondents recognize the support visitors provide to local businesses.

The survey also asked residents what they believe are the three most important issues that need to be addressed in the next ten years to ensure the Hocking Hills area remains a rewarding place to live and visit. The most frequently chosen issues were

- The need to place limits on tourism development growth, and
- The need for visitors to pay a fair share for the wear and tear they place on the community.

Q1: We know that the visitor economy affects our community in different ways. Please indicate your level of agreement with the following statements:



Policies impacting Destination Stewardship in the Hocking Hills

The popularity of the Hocking Hills and the proximity of the region to both Columbus and Cincinnati cause many of the destination stewardship challenges faced by the region. Municipal and state regulations and policies could greatly assist in managing these challenges. HHTA has no control on these policies.

Property regulation – Outside of Logan, there are currently limited or no land use regulations. Without some form of zoning controls, uncontrolled growth of short-term rentals and unregulated lodging properties can continue to be developed unchecked. The demand for property that can be used for short-term rentals plays a large role in the spikes in land value and ultimately in increased property tax assessments. Unregulated growth in supply will continue to be detrimental to the future of Hocking County residents.¹

Public lands – Hocking County contains a state park, a state forests, three state nature preserves, and a portion of Ohio's only National Forest. The acreage of the state and federal land within or adjacent to Hocking totals nearly 80,000 acres, roughly 29% of Hocking County's total acreage². Additionally, land conservation easements in Hocking County help preserve natural areas. Ohio is one of only seven states that does not charge an entrance fee, allowing free entrance to all state lands³. Based on visitor volume within the Hocking Hills, the popularity of free admission and the impacts created in use are unsustainable. The lack of entrance or parking fees promotes greater use and visitation while also limiting collections of potential funding that could be reinvested in trail maintenance, trash collection, and public safety. Public land policies are a definite need within Hocking County.

Sources: 1) www.hml-law.net/2023/03/ohio-rural-land-laws/;

2) www.athensconservancy.org/aaorg/aaorg-hocking.html;

3) www.columbusmonthly.com/story/lifestyle/features/2022/06/08/ohio-state-parks-free-admission-pass-required/10002939002;

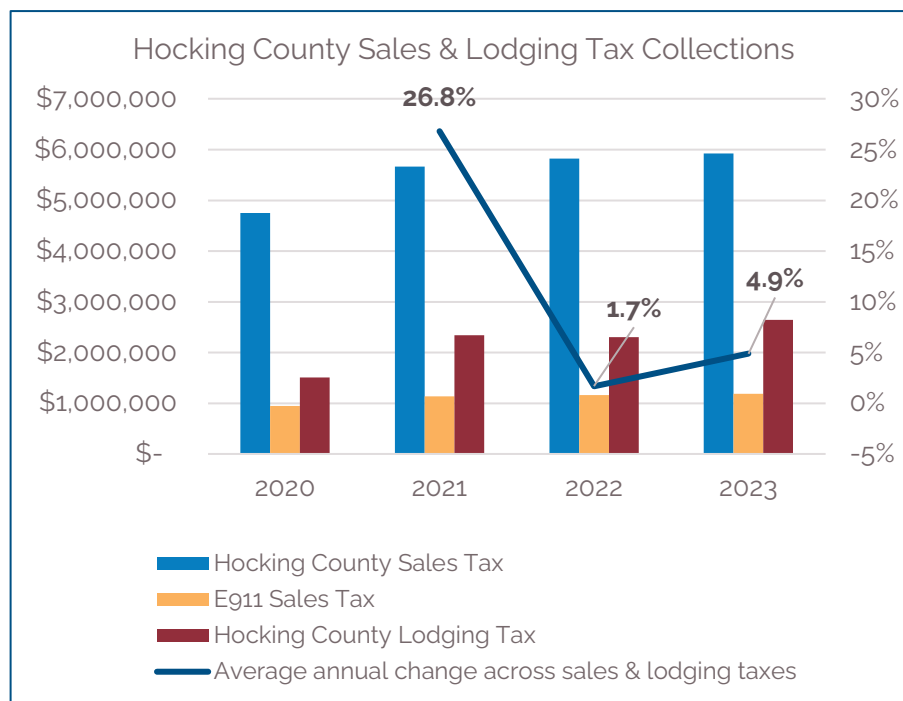


Destination Stewardship Policies

Public Safety – Public safety policies are directly connected to enforcement. Given the challenges that the Hocking Hills is experiencing, especially related to day trip volume, ramping up enforcement and patrolling can help ease the strain of visitor volume. Warnings during off-season periods and weekdays can help persuade ideal and desired behaviors, while also projecting the area's friendly nature. Peak season volume require heavier enforcement, as unauthorized parking and inappropriate use of trails creates safety issues for others. Fines should be costly enough to curb behaviors and help cover the expenses of enforcement. Enforcement does not need to be communicated as a negative (i.e., No Parking), and public safety officials should work together with HHTA for messaging options.

Visitor taxes – Tourism businesses pay property tax and charge sales tax, while accommodations properties also collect lodging taxes from the customers they serve. Hocking County levies a three percent lodging tax on all accommodations of greater than one unit. Statewide enabling legislation allows the County to keep 5% of the amount collected as an administrative fee but stipulates that the remaining 95% of collections be invested in the strategic programming and operations of the Hocking Hills Tourism Association. HHTA is transparent with their portion of the funding and how that funding must produce "benefits to be derived from the promotion of such purposes and premises." Without marketing and programming from HHTA, there is no certainty of stability in overnight tourism production for the Hocking County economy. The chart to the right shows the volatility of tourism taxes as a reflection of changes in visitor volume and associated spending.

Beyond the three percent Hocking County lodging tax, overnight guests are also charged a 3% municipal lodging tax based on the location of the property. Additionally, a 7.25% sales tax rate (5.75% State plus 1.5% County) is charged, but only if the property has five or more units. Included within the 1.5% County tax is a ¼% amount designated for the Hocking County 911 service. Other than the Eg11 allocation, the amount collected from both the municipal lodging tax and the sales taxes are channeled through the taxing body's general fund with no stipulations on how those funds must be used.



Comparative Context

As the Hocking Hills region continues its pronounced commitment to destination stewardship, it can monitor how similar communities with strong outdoor recreation/scenic beauty assets are working to manage the rapid shift in market demand and resident feels about tourism.

Estes Park, CO

2022 Population: **5,862**
 Park visitation: **4,115,837***
 Growth from 2018: **-10%+**
 Hotel rooms: **2,681**
 Short-term rental units: **4,202**

Fredericksburg, TX

2022 Population: **11,257**
 Park visitation: **294,485***
 Growth from 2018: **7%**
 Hotel rooms: **1,299**
 Short-term rental units: **5,705**

Gatlinburg, TN

2022 Population: **3,650**
 Park visitation: **13,297,647***
 Growth from 2018: **16%**
 Hotel rooms: **5,646**
 Short-term rental units: **15,494**

Sedona, AZ

2022 Population: **9,790**
 Park visitation: **430,476***
 Growth from 2018: **-8%**
 Hotel rooms: **11,085**
 Short-term rental units: **9,222**



Estes Park, Colorado

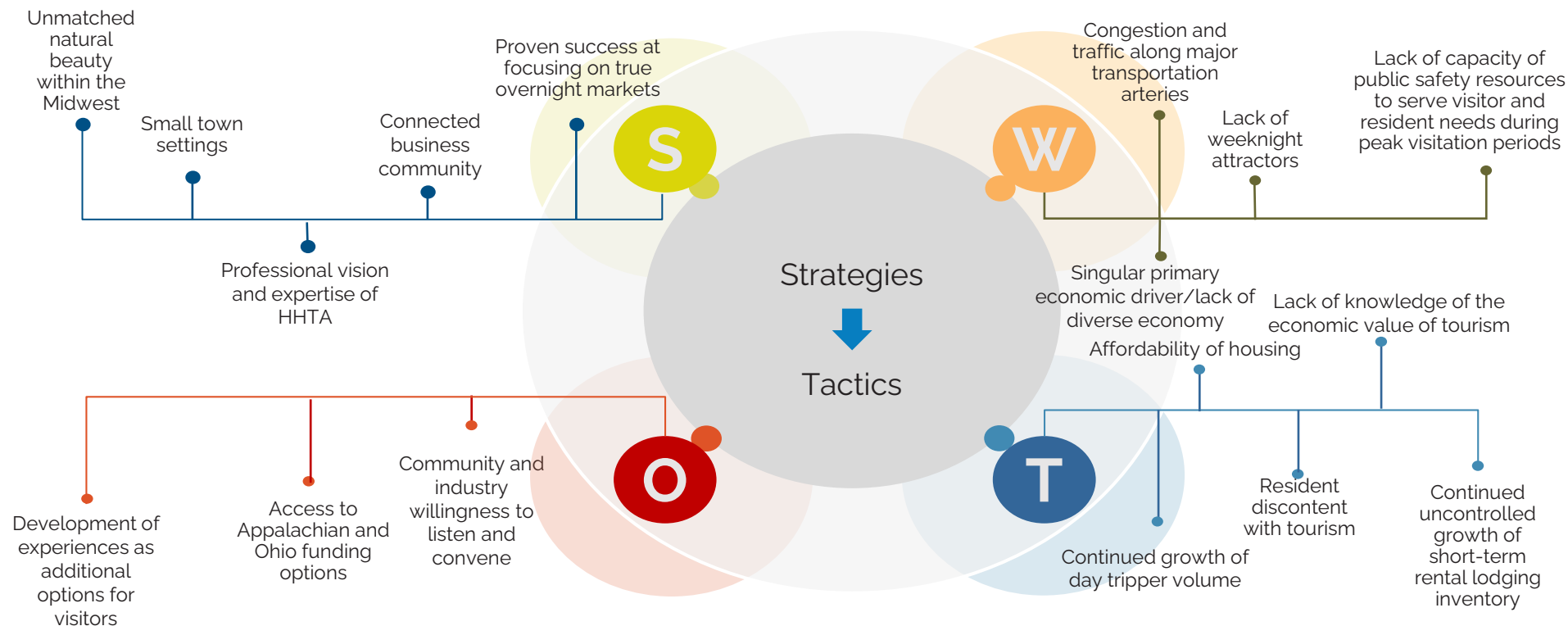


Fredericksburg, Texas

* 2023 +Implemented time entry policy

Strengths – Weaknesses – Opportunities - Threats

Research analysis and community engagement can be summarized into clear strengths, weaknesses, opportunities, and threats. Successful destination stewardship depends on averting threats, converting the weaknesses, and pursuing the opportunities.



Recommendations and Direction

The recommendations of this Destination Stewardship Plan seek to accomplish six key goals, three directly tied to the mission and purpose of Hocking Hills Tourism Association and three that are fully outside the control and influence of the HHTA.

Destination Stewardship Goals for HHTA	Destination Stewardship Goals beyond HHTA
Address visitor behavior and impact across the Hocking Hills	Manage future growth of short-term rental properties throughout the Hocking Hills
Address the importance of generating overnight stays in the Hocking Hills	Manage future need for public safety public safety for both residents and guests of Hocking County
Address local perceptions of the importance of tourism to the economy of the Hocking Hills	Address congestion and infrastructure strain along roads and trails caused by volume of use in the Hocking Hills natural areas

The goals beyond the HHTA require commitment from multiple organizations and community leadership. The HHTA will be focused on delivering the three recommended strategies tied to their mission. The goals beyond the HHTA will need community leadership to stay focused and build the advocacy necessary for success.



The Stewardship Collaborative

This Destination Stewardship Plan requires clear roles and cooperation across the entirety of Hocking County for success to occur. The formation of a Stewardship Collaborative is recommended for ensuring actions and results are communicated, assigned, and valued going forward. The Stewardship Collaborative should initially include the following representatives:

- Members of the Hocking Hills Tourism Association
- Members of the Hocking County tourism business community
- Residents of Hocking County
- Locally elected member of the Ohio Legislature
- Government officials from the State of Ohio
- Government officials from Hocking County
- Government officials from the city of Logan
- Government officials from the village of Laurelville

The Stewardship Collaborative should be the advocacy body that pursues needed policies that will help with managing destination growth. The Stewardship Collaborative also provides a forum for participants to communicate their work and accomplishments in destination stewardship. The structure of the Stewardship Collaborative members and frequency of their meetings should be determined within the first meeting. The initial concept for the Stewardship Collaborative includes a minimum of 15 individuals meeting quarterly. It is recommended that the Stewardship Collaborative not be a program of the HHTA, although the organization may have to convene the initial meeting.

Stewardship Collaborative Roles

The groups that comprise the Stewardship Collaborative are expected to communicate on their various efforts and needs as related to Destination Stewardship. The respective roles of each of the participants provide an opportunity for updates on programs and policies.

The Role of Hocking Hills Tourism Association

- Marketing for overnight visits during shoulder seasons and off-peak times of the year/days of the week
- Communicating use expectations and responsible tourism
- Communicating dispersion options to visitors
- Enabling visitor engagement through signage and technology
- Convening and facilitating destination stewardship collaborations
- Providing educational support on destination stewardship issues
- Coordinating services to help fill the needs of businesses
- Communicating priorities and needs to residents and community leaders

The Role of Tourism Stakeholders

- Lending business support for advocacy priorities
- Updating HHTA, local and state government, and other entities on specific business needs and success stories
- Communicating visitor management programs to visitors
- Participating in community collaborations

The Role of Residents

- Providing voices and support to government official regarding advocacy priorities
- Updating HHTA, local and state government, and other entities on challenges and successes
- Providing visitor guidance
- Participating in community collaborations

The Role of Local Government

- Providing property regulations on future development, land use, and management
 - Utilize public safety and retention of residents as justification
 - Establish thresholds and expectations for new business growth (short term rentals/cabins)
 - Monitor and manage hospitality service supply
- Acknowledging the various sources of taxes and how those sources are generated
 - Competition for overnight stays
 - Roles of lodging, sales, and property taxes
- Delivering respectful and consistent enforcement
- Planning and investing in needed stewardship infrastructure
 - Transportation Communications
 - Public Safety Workforce

The Role of State Government

- Providing leadership through public land management
 - Utilize congestion, land impacts, public safety, and visitor satisfaction as critical needs
 - Understand the local needs and challenges
 - Work to address needs through policies and management opportunities
 - Proactively communicate desired outcomes of management policies
- Supporting local initiatives that address stewardship needs and direction
- Delivering for respectful and consistent enforcement
- Planning and investing in needed stewardship infrastructure
 - Transportation Forest trails and trailheads
 - Communications Public Safety
 - Signage directing visitors to alternative options
 - Workforce



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HHTA Recommended Strategies and Actions

The recommended strategies that follow are focused specifically on the Hocking Hills Tourism Association, as the destination organization for Hocking County. The four types of roles shown below will guide how HHTA should take on each strategy or task.

ENCOURAGE RESPECTFUL VISITOR BEHAVIORS

Provide comprehensive programs that help persuade actual and potential Hocking Hills visitors to respectfully care for the destination

CONVENE COLLABORATIVE ENGAGEMENTS

Act as the primary convener for both the Stewardship Collaborative and other initiatives that promote engagement and education of the community

PRESENT THE VALUE OF TOURISM

Deliver effective and influential programs that communicate the important role that tourism plays for Hocking County

ENCOURAGE RESPECTFUL VISITOR BEHAVIORS

Expected Outcomes:

- Overnight business becomes more consistent across days of the week and times of the year
- All travelers treat the Hocking Hills with respect and care
- Eased congestion on key transportation arteries and within parking areas



What Hocking Hills Tourism Association Must Do

Prior to the pandemic, HHTA shifted its primary target markets to points of origin that necessitate an overnight stay. This focused targeting must continue, as the area is not suffering from too many overnight stays. Additionally, concentration of these marketing resources on travel segments that can visit during non-traditional seasons and days of the week will help consistently spread overnight stays and the resulting employment produced. The messaging for this marketing outreach should include both the invitation to visit and a plea to visit responsibly. Certain markets within Ohio should not be targeted with paid advertising, as these areas will continue to create media requests and engagement on social media. The HHTA should be focused on using media relations and social media content to illustrate desired visitor actions and options that disperse visitor activities beyond the core outdoor recreation assets.

Why This Is Important

Day tripper visitor volume and corresponding activity patterns while in the area compound the sense that tourism to the Hocking Hills is out of control. Marketing for visitor management requires content and messaging that creates an emotional reminder of how the visitor should leave the area. Producing content, imagery, and scripts that clearly show the need and importance of responsible travel, while inspiring visitors to be part of the solution and showing how these behaviors will improve their experience, will help address inappropriate visitor behavior.

Spreading visitor patterns beyond Hocking Hills State Park and into other parts of the region will help alleviate bottlenecks and congestion within the region's core attractions.

The businesses of the Hocking Hills, and the hospitality workforce they support, need a more consistent level of overnight visitation across both days of the week and seasons of the year. The area's peaks and valleys of overnight stays create fluctuations in income for the area's front-line staff.

STRATEGIES TO ENCOURAGE RESPECTFUL VISITOR BEHAVIORS

Continue marketing for overnight visitors

1. Continue and expand efforts (media relations, social media, digital, and advertising) targeting only those geographic markets that must stay overnight
2. Focus targeted market segments, stories, imagery and content on:
 - Shoulder and off-season months
 - Weekday options
3. Continue emphasizing the focus on shoulder and off-season months or weekday options to special event and wedding planners seeking to produce new offerings in Hocking County



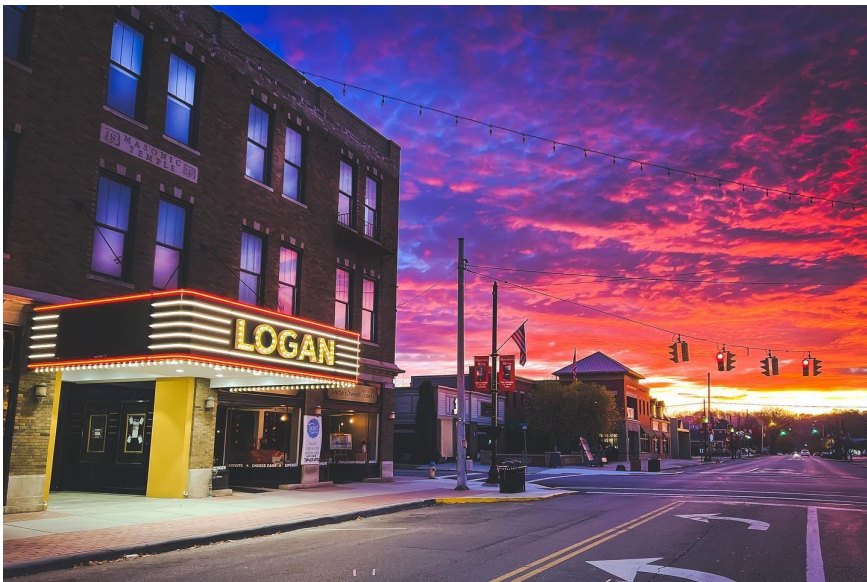
Inform and educate visitors

1. Produce ongoing compelling educational materials, inspired by past effective campaigns such as *"Keep America Beautiful,"* *"Woodsy the Owl,"* and *"Smokey the Bear"* to inform travelers of the importance of their commitment to **Love Hocking Hills**, while showing how desired behaviors improve visitors' experience
2. Compile pre-packaged content for social media posts, media relations, and visitor information that reinforces the role each visitor must play to keep the Hocking Hills beautiful and safe for visitors and residents alike, and the importance of respect of property
3. Expand the Leave No Trace principles of **Love Hocking Hills** into subtle promotional reminders
 - Place this content into community partners' businesses, local stores, gas stations, and restaurants
 - Partner with these businesses to expand the program through sponsorship support
 - Consider an incentive program such as a drawing for a free item or service from a local business for signing the Love Hocking Hills pledge
 - Look for opportunities to further integrate Love Hocking Hills messaging on key website pages: the home page and pages where visitors may be choosing their activity, such as the Hiking in the Hills, State Park, and Old Man's Cave pages; consider direct stewardship messages, such as please stay the trail and pack out trash messaging
 - Use Columbus media opportunities to promote a stewardship message

STRATEGIES TO ENCOURAGE RESPECTFUL VISITOR BEHAVIORS

Encourage visitor use of shuttling

1. Continue collaborating with Logan Transit to provide Saturday and Sunday shuttle services during peak season
2. Explore feasibility and costs for adding Saturday and Sunday shuttle services during shoulder seasons
3. Place informational signage and marketing into vacation rentals and lodging properties to encourage or incentivize the use of the shuttle services
4. Build promotions of the shuttle service into travel planning, communications, content, and collateral
5. Collaborate with public safety as part of the communications channel for encouraging shuttle use



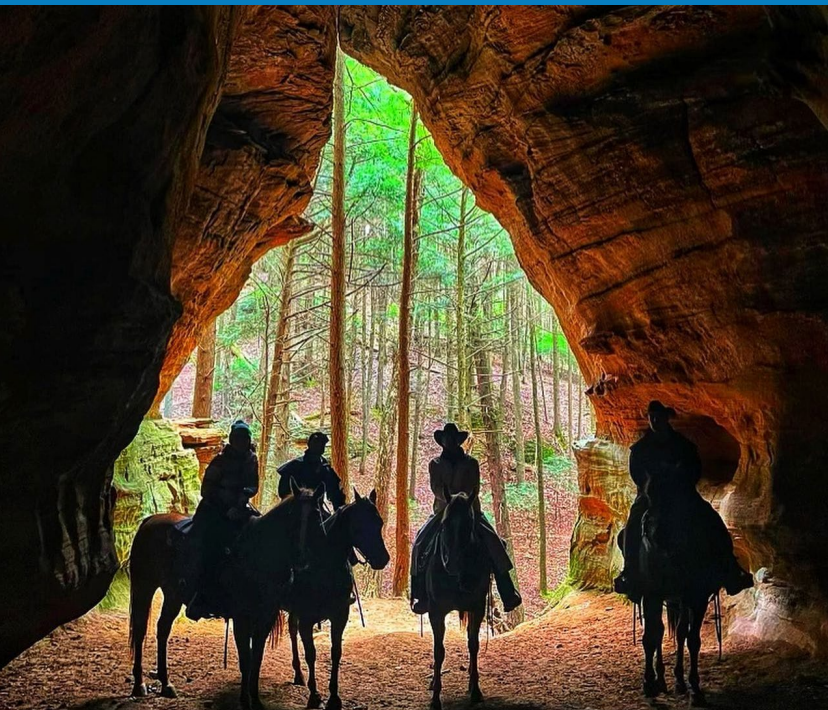
Encourage visitor dispersion to alternate options

1. Continue to provide collateral materials and digital communications on activities and sites beyond Hocking Hills State Park
2. Examine the viability and appeal of potential alternative visitor experiences based on their potential to help disperse visitor activities throughout the Hocking Hills
3. Assist in producing compelling experiences by
 - Continue utilizing the destination investment fund to enhance quality of life and visitor experiences
 - Producing content illustrating the transformational impacts created through the investments in the children's museum, the Logan theater, the butterfly trail, and other product development investments
 - Creating a formal toolkit of supportive programs, funding sources, and services to provide experience development options suitable for both businesses and for-profit entities seeking to offer product development outside congested visitor areas
 - Working with local economic development and the Small Business Administration to disseminate the toolkit

CONVENE COLLABORATIVE ENGAGEMENTS

Expected Outcomes:

- More effective engagement and communications with community members and businesses to help spread and deeper comprehension of tourism's role and direction in Hocking County and a better understanding of resident and business needs



What Hocking Hills Tourism Association Must Do

The Hocking Hills Tourism Association should work with other community organizations to regularly convene gatherings and engagements that foster and facilitate the sharing of data and information. The content for these gatherings should be based on both the type of gathering and the audience groups being assembled, with residents being a regular audience. The gatherings should always include sharing of the latest research and programming content from HHTA and options for open communications and listening.

Why This Is Important

The pandemic sparked a radical and rapid shift in visitor volume, visitor behavior, and lifestyle patterns that changed numerous communities across the United States. The Hocking Hills endured unprecedented pressure from this spike in popularity. The dramatic growth in day tripper traffic on weekends and holidays, combined with seasonal overnight demand for cabins and short-term rentals, caused residents to feel crowded out and undervalued. Revised property tax assessments caused by the growth in real estate demand compounded residents' stress. Communication and active listening can help create understanding of the residents' needs and jumpstart collaborative efforts to address the real causes of stress, not just the indicators.

STRATEGIES TO CONVENE COLLABORATIVE ENGAGEMENTS

Facilitate interaction across community organizations

1. Organize and host an annual "Striving for Balance" workshop to present the latest destination stewardship research, programming, and trends
2. Facilitate the initial convening of the Stewardship Collaborative
3. Partner with Hocking County and public safety officials to petition the state and telecommunications providers to install cell phone booster towers along Highways 93, 664, and 56
4. Hold quarterly updates on destination stewardship programs of the HHTA
 - Film the updates to place online for anyone unable to attend
 - Invite both tourism stakeholders and business members to participate
5. Partner with local teachers and students to develop easy-to-use destination stewardship curriculum materials and spread across targeted grade levels in Ohio
6. Invest in research that better informs destination stewardship decisions, monitors changes in visitor behavior, and documents fluctuations in visitor volume
7. Convert communications content and research findings into destination stewardship toolkits that can be shared with different community organizations and not-for-profits
8. Share research findings across all collaborative engagements



PRESENT THE VALUE OF TOURISM

Expected Outcomes:

- Residents and community leaders understand the valuable role tourism plays across the community
- Tourism benefits are more effectively communicated to audiences within Hocking County



What Hocking Hills Tourism Association Must Do

Support for tourism in the Hocking Hills is at a critical juncture. There is only one organization, the HHTA, that can and should begin the process of reinvigorating community views on tourism. Tourism is a vital and vibrant industry for the Hocking Hills. To help reset community sentiment on the value of overnight stays, communications need to include certain key elements, including:

- Why is tourism important to the local economy and residents' costs and quality of life?
- How does tourism enable residents to earn livelihoods and stay in the area?
- Where do visitor taxes go?
- What community assets are supported by tourism spending?
- How do visitors in overnight travel markets learn about the Hocking Hills?
- How does HHTA manage advertising to address seasonal peaks and valleys?
- How is destination stewardship working to change visitor behaviors in Hocking County?
- What is needed to ensure that resident quality of life is a key consideration for future tourism decisions and infrastructure development?

HHTA must be the leader that communicates the answers to those questions.

Why This Is Important

Tourism is the primary driver of the Hocking Hills economy. Unlike other industries that can move to locations, tourism cannot and will not relocate because the assets are locked into place. Tourism can be pinched by a lack of local support and governmental attempts to divert funding. Tourism is extremely competitive, and marketing for overnight stays must continue. Additionally, there is no organization in the Hocking Hills like the HHTA, as it understands how to speak to the audiences, influence the travel patterns, and address fluctuations in the marketplace. When it comes to visitor management of day trippers, HHTA is best equipped to maneuver communications to help address how these guests visit the area. In the Hocking Hills, day tripper visitor volume is not going to go away, but frayed resident sentiment can halt tourism promotion efforts and lead to a true decrease in overnight stays and the economic impacts they bring.

STRATEGIES TO PRESENT THE VALUE OF TOURISM

Drive an understanding of tourism's role & impact

1. Activate a comprehensive and objective destination stewardship communication program that includes each of the following strategic educational elements:
 - Educate stakeholders and residents on HHTA's efforts to support both the economy and quality of life
 - Educate residents on the value of tourism to the economy and to livelihoods of local households
 - Clearly outline HHTA's role and how it is advancing destination stewardship within the channels it has available
 - Address local perceptions regarding the future direction of tourism in the Hocking Hills
2. Align stewardship communications to respective audiences and their connections to impacts
 - Residents – Evidence of tax savings, Efforts to relieve congestion, Advocacy to curtail future development of short-term rental sites
 - Public safety – Collaborating on ways to improve public safety through visitor messaging
 - Elected officials and governmental leaders – The importance of tourism in generating visitor tax dollars
 - Businesses – The commitment to continue marketing in areas that will produce overnight stays, especially for off-season and weeknight trips
 - All – The collaborative need to find solutions that address community needs while sustaining the tourism economy
3. Continue surveying local businesses and residents to evaluate program effectiveness and adjust future messages and outreach to continually improve transparency and credibility of the HHTA and its commitment to the community.



Conclusion

As Columbus grows, so will visitation to the Hocking Hills. Day trips from Columbus will not produce the economic impact needed to provide tax revenue and jobs for area residents. Travel spending depends on overnight stays, and overnight stays depend on strategic marketing and outreach.

There is an important distinction between marketing for overnight stays and marketing to encourage or discourage certain visitor behaviors. The Hocking Hills Tourism Association must do both effectively, strategically, and quickly.

Additionally, the HHTA must communicate with its community to create an understanding of the direction and clarify the roles and responsibilities of the HHTA, both what it can do and what it cannot do.

For those needed actions that fall outside of HHTA, and there are many, the organization must act as a convener, bringing together other needed parties to form a Stewardship Collaborative and press for needed changes in policies, enforcement, and infrastructure.

In combining the three key strategic efforts, the Hocking Hills will reset its footing on the path to balancing resident quality of life with business success and visitor satisfaction. That will be true destination stewardship.



TAKE THE LOVE HOCKING HILLS VISIT RESPONSIBLY PLEDGE

I will do my homework and visit prepared.

I will dress for the trail and not the catwalk.

I will stay on the trails at ALL times.

I will etch my memory, not the trees or caves.

I will take only pictures and leave only footprints.

I will remain in one piece by leaving wildlife in peace.

I will scoop the poop, pick up after my pooch, and carry it out.

I will play nice with fellow visitors.

I will camp only on permitted surfaces and be responsible with my campfire.

I will be part of the solution, not the pollution.



April 2024

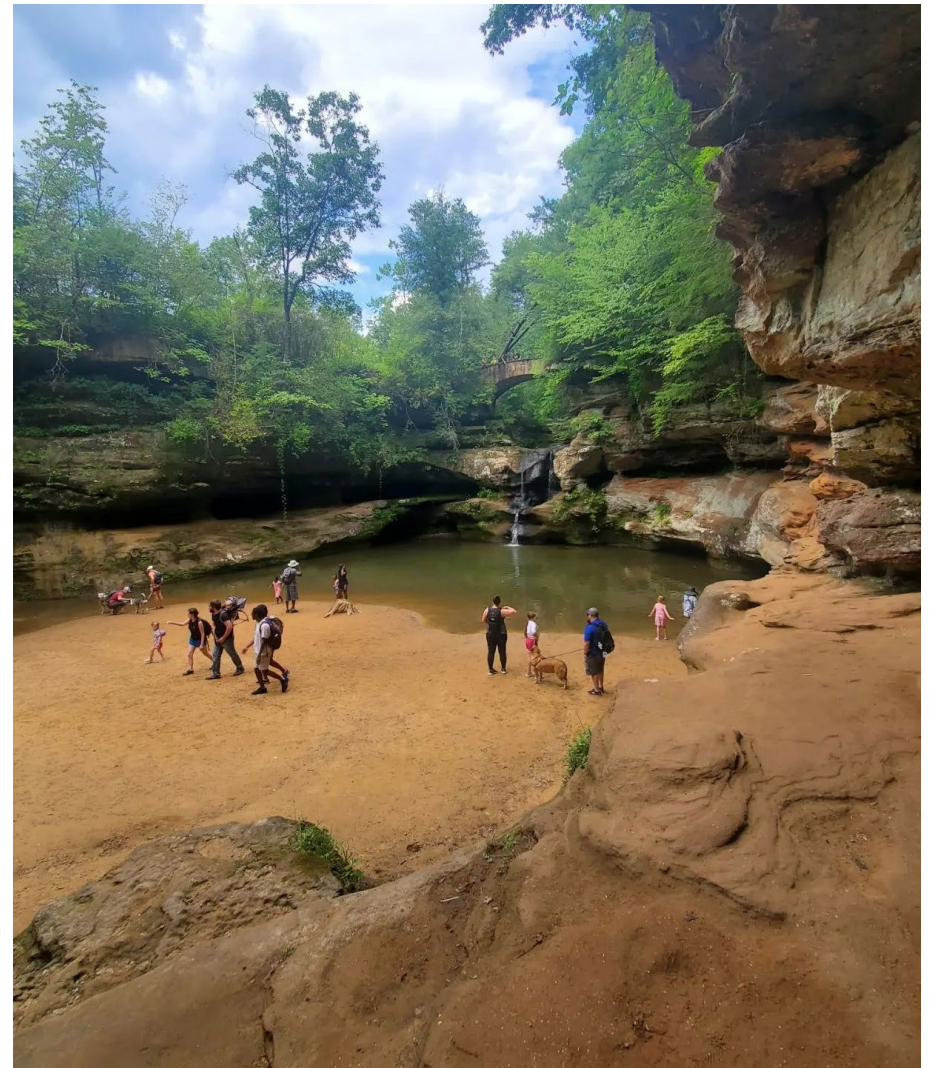


Appendix

The Hocking Hills Destination Stewardship Plan

The following items are included within this appendix:

- Attendee list and content used for interviews, small group sessions, and resident town halls (pages A2-A24);
- Full Destination Assessment report (pages A25-A36); and
- Presentation of Stakeholder and Resident survey results including recommended options for communications (pages A37-A75).





STAKEHOLDER ENGAGEMENT

Hocking Hills Tourism
Association

October - November 2023



Interviews – Town Hall – Small Group Session Attendees

The following individuals identified themselves as participants in one or more of the input initiatives that went into the creation of this Destination Stewardship Plan:

- Kylie Arnett
- Mark Bailey
- Monte Bainter
- Jenna Balazs
- Meriah Bond
- Holly Borer
- Derek Brammell
- J. Paige Brown
- Mira Burns
- Avery Cook
- Stefanie Corbett
- Cindy Coss
- Doug Ellis
- Joy Evangelista
- Thema Farmer
- Mayor Greg Fraunfelter
- Brice Frasure
- Rob Freda
- Valerie Freda
- Larry Gerstner
- Josh Givens
- Elizabeth Heil
- Judie Henniger
- David Honeycutt
- Susan Jester
- Kelli Johnson
- Mark Johnson
- Rita Jones
- Sue Karshsner
- Nathan Krantz
- Danielle Lehman
- Zac Loomis
- Carol Mackey
- Audrey Martin
- James Martin
- Ron Moder
- Rebecca Miller
- Christa Myers
- Maria Myers
- Megan Myers
- Melinda Norfleet
- Sandra Ogle
- Beth Phillips
- Karen Raymore
- Sheila Rebertus
- Doug Rebertus
- Hunter Reed
- Julie Romine
- Ann Sauers
- Janey Saving
- Hobart (Hobie) Shaw
- Roger Shaw
- Dee Sinkovitz
- Shandra Smith
- Tony Stafford
- Heather Stehle
- Raina Stine
- Roger Stivison
- Linda Thomas
- Greg Vermillion
- Nyla Vollmer
- Kay Wilson
- Audie Wykle

Individuals that did not complete the Sign-in sheet at one of two town hall sessions are absent from this list.



Tourism Stewardship

Community Input



Town Hall Agenda

1. Importance of tourism stewardship
2. Introductions
3. Initial findings (Opportunities & Challenges)
4. Solutions from elsewhere
5. Most meaningful concepts for Hocking Hills
6. Actions and involvement
7. Next steps

Tourism Stewardship Objectives

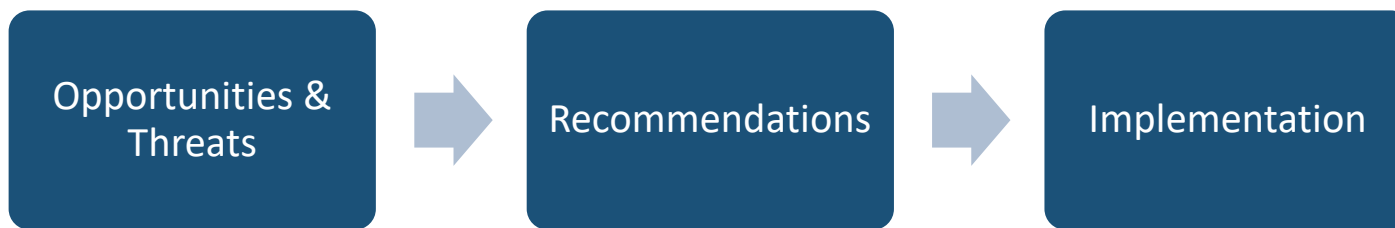
- To ensure the Hocking Hills are protected and preserved for generations to come.
- To create a Hocking Hills Tourism Stewardship Plan that:
 - Incorporates the feedback, needs, and desires of local stakeholders and
 - Provides a roadmap for Hocking County's sustainable destination management, marketing, and product development.

Stewardship Planning Process

Inputs



Outputs



Today's Purpose

- To ensure the Hocking Hills are protected and preserved for generations to come.
- To create a Hocking Hills Tourism Stewardship Plan that:
 - **Incorporates the feedback, needs, and desires of local stakeholders** and
 - Provides a roadmap for Hocking County's sustainable destination management, marketing, and product development.

Town Hall Introductions



Initial Findings

- **Value of tourism**

- Jobs and employment
- Thriving economic driver
- Taxes generated
- Connecting people to outdoors and nature
- Beauty and community pride
- Vitality and liveliness

But there are costs...

Initial Findings

- **Challenges from popularity and tourism growth**
 - Real estate
 - Investments in short term rentals & cabins
 - Elevated demand for real estate
 - Higher costs for residents
 - Tax assessments for residents vs. businesses
 - Saturation of marketplace
 - Land use policies
 - Absentee ownership/sense of belonging

Initial Findings

- **Challenges from popularity and tourism growth**
 - Public Safety
 - Traffic congestion
 - Overfilled parking areas
 - Visitor decisions
 - Perceptions of visitors behaving badly
 - Maintenance
 - Roadways
 - Trailheads and parking areas
 - Trails

Initial Findings

- **Other challenges**

- Economic stability
 - Dependency on tourism
 - Availability of workforce
 - Competitive wage levels for service positions
 - Availability of moderately priced starter homes
- Broadband access
- Funding for infrastructure & services

Initial Findings - Audiences

Residents

Overnight Visitors

Commuters

Day trippers

**Businesses &
Employees**

**Investors &
Developers**



Potential Solutions

Real Estate & Land Use

- Land Use Policies
 - Zoning, development guidelines, residency requirements
- Short term rental development & conversion policies
 - Proffers on new short term rental development, Saturation moratoriums
- Taxing
 - Resident rate vs. business rate vs. out of area ownership rate

Solutions Wish List

- What is on your wish list of real estate related solutions that will be most meaningful to each of you and ensure the Hocking Hills are protected and preserved for generations to come?

Potential Solutions

Visitor Patterns

- Dispersion or Channeling
 - “Left Turn” attractions & downtown Logan
 - Direct to hidden gems
 - Sacrifice the most popular sites to visitors
- Congestion management
 - Realtime alternatives, Rigid enforcement of parking policies
 - Timed entry into park, Required shuttling into park
 - Infrastructure investments
- Daytripper management (30% of 2019 market)

Solutions Wish List

- What is on your wish list of visitor pattern related solutions that will be most meaningful to each of you and ensure the Hocking Hills are protected and preserved for generations to come?

Potential Solutions

Other

- Diversify the local economy
- Broadband/Cellular coverage
- Infrastructure investments

Solutions Wish List

- What is on your wish list of any other solutions that will be most meaningful to each of you and ensure the Hocking Hills are protected and preserved for generations to come?

What is the top priority to address first?



Going Forward

- How are you willing to stay involved to be part of the solution?

Next Steps

Survey Residents & Stakeholders

Narrow & Validate Solutions

Provide Final Recommendations



Thank You!

David Holder – david@clarityofplace.com
Tina Valdecanas – tina@clarityofplace.com
Donna Childress – donna@clarityofplace.com
tkoerte@longwoods-intl.com



DESTINATION ASSESSMENT

Hocking Hills Tourism
Association

March 2024



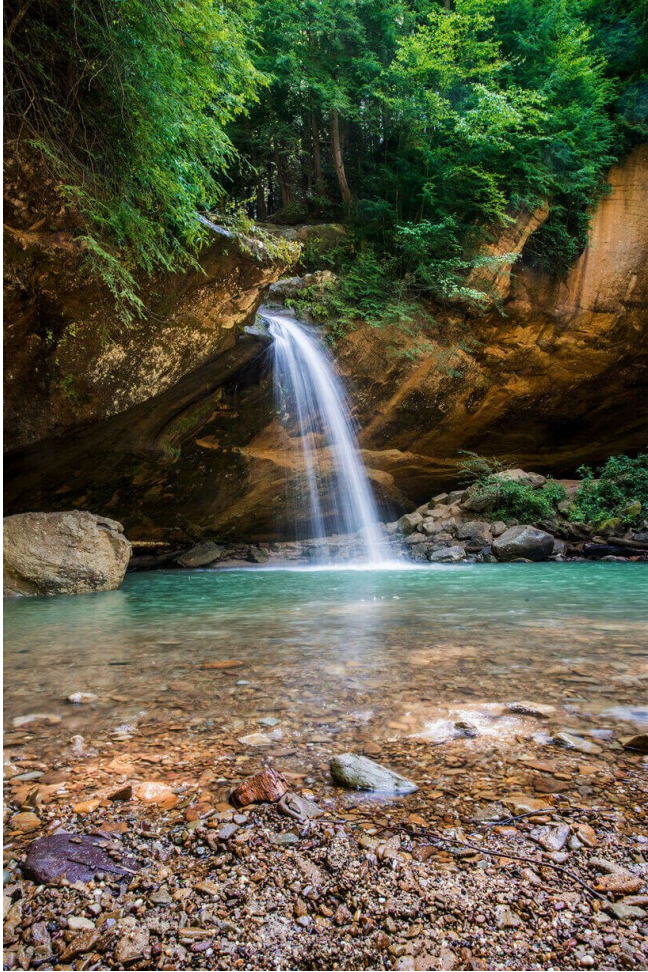


Table of Contents

Overview

Where Hocking County Stands

- Destination Product
- Visitation Trends
- Lodging
- Transportation Infrastructure

Lodging Tax Collections and Use

OVERVIEW

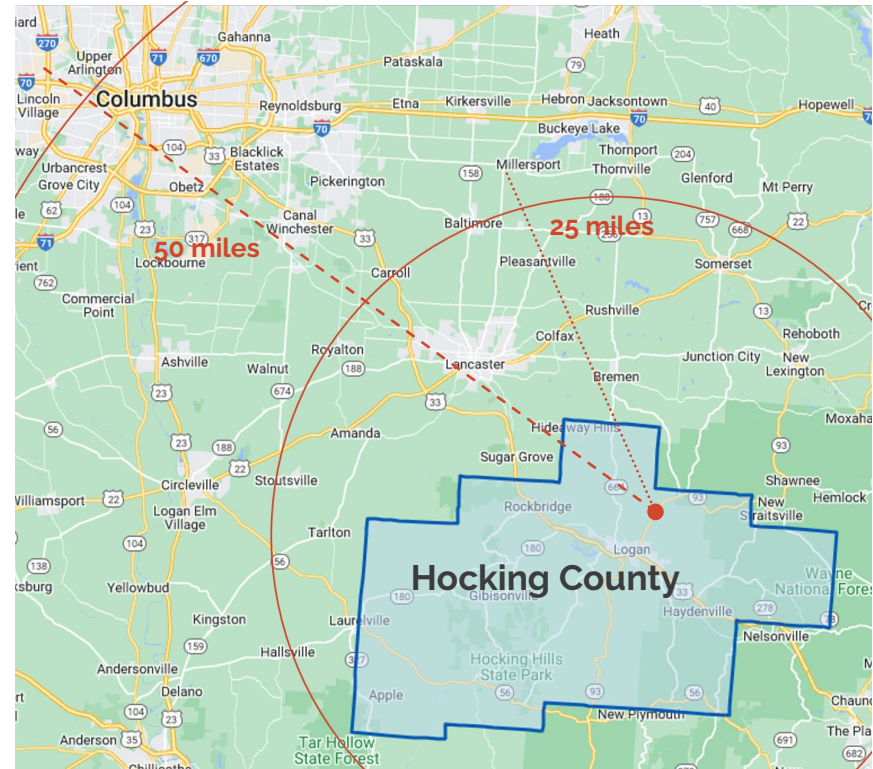
To provide context from which to build the Destination Stewardship Plan for the Hocking Hills Tourism Association, Clarity of Place assessed Hocking County's destination product and the area's infrastructure.

The Destination Assessment provides a snapshot of the county's destination product (including demand drivers) and the civil infrastructure to support visitor activity in the area.

Hospitality Assets

- **Demand Drivers:** Assets and places that provide a reason for or motivation for travelers to visit
- **Attractions and Experiences:** Activities and places that visitors use to enhance/expand their visit
- **Hospitality Industry:** Services and amenities that make a visit enjoyable
- **Infrastructure/Accessibility:** Civil and community infrastructure that services visitors and allows them to get to/from/within the destination.

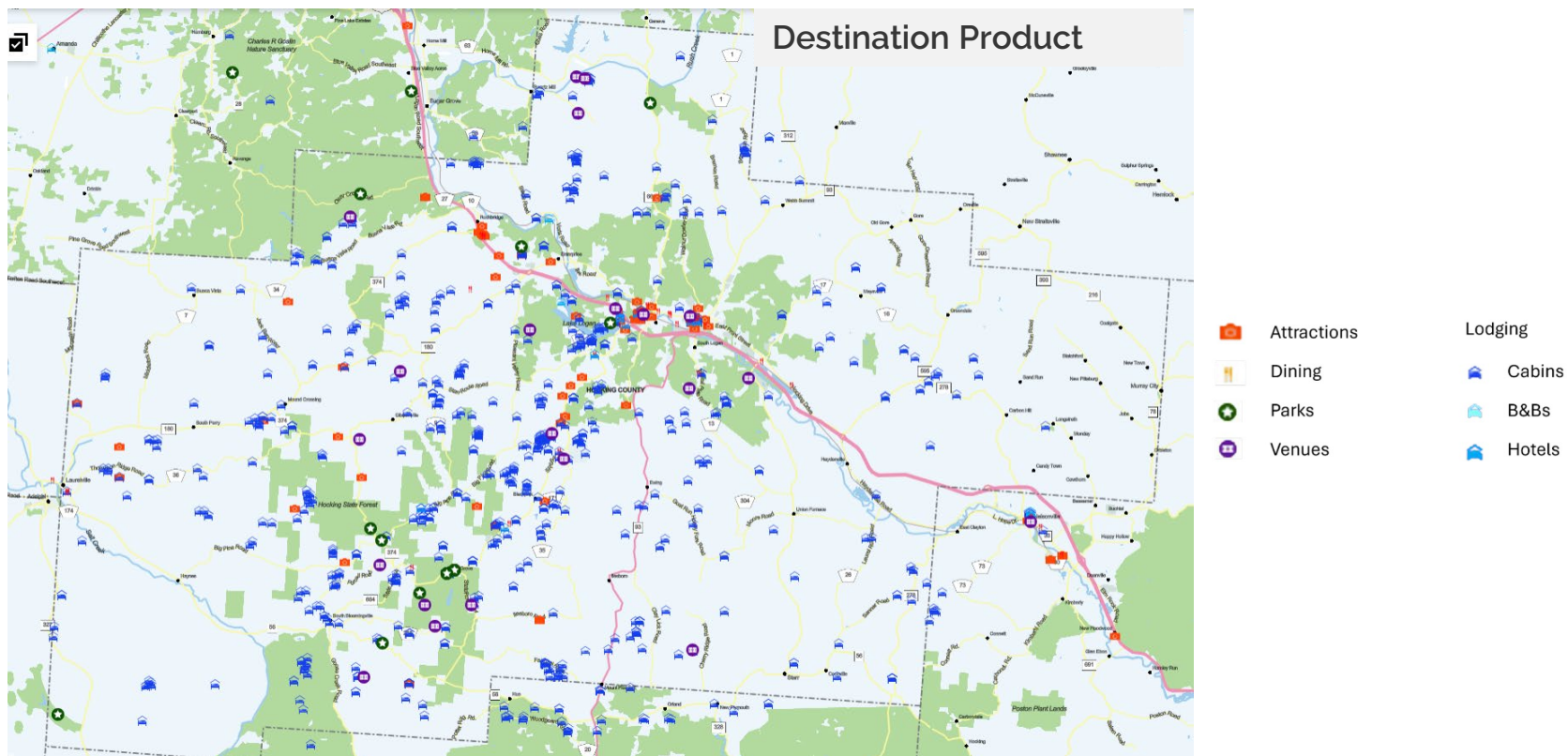
Hocking County, OH



WHERE HOCKING COUNTY STANDS

Situated at the outskirts of the Greater Columbus Metropolitan Statistical Area (MSA) in southeastern Ohio, Hocking County is known for its natural beauty and outdoor recreational opportunities. As part of Appalachia, Hocking County shares many of the distinctive traits and characteristics that define the region.

Hocking Hills State Park is a distinctive feature of the area and a key demand driver for visitors. The park's more than 2,300 acres offer towering cliffs, deep gorges, waterfalls, and dense forests. Managed by the Ohio Department of Natural Resources, the park offers a variety of outdoor activities such as hiking, camping, rock climbing, and birdwatching.



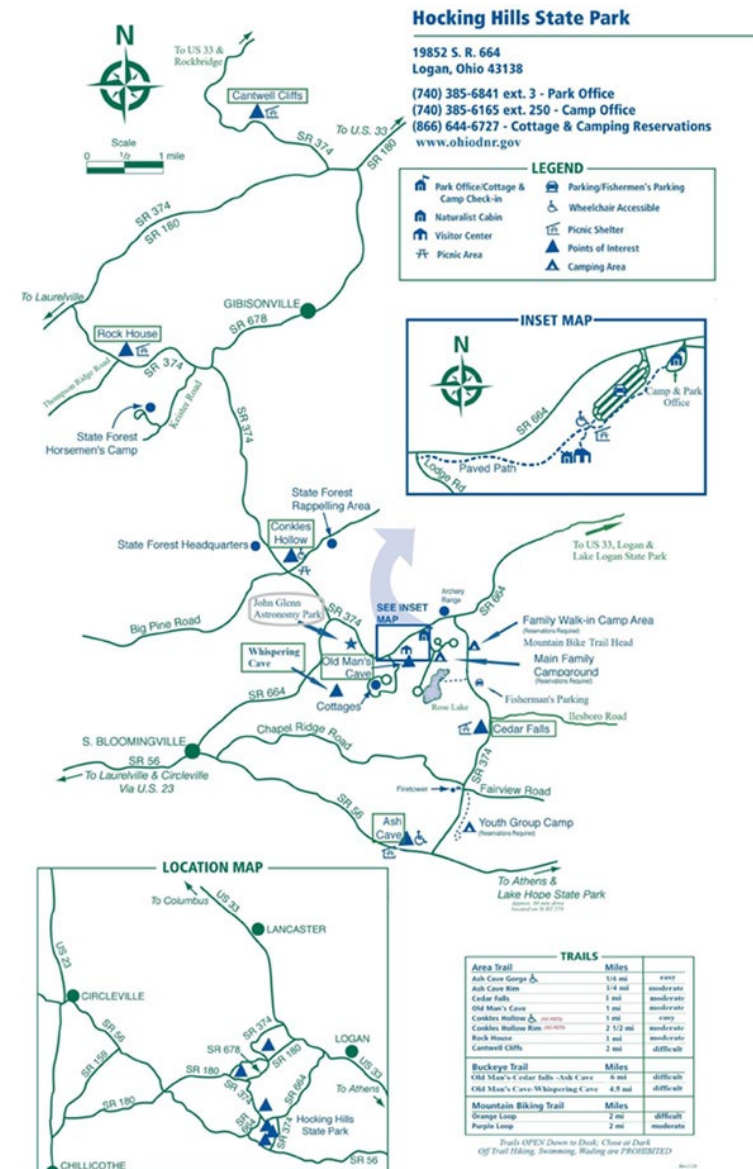
DESTINATION PRODUCT

The county's proximity to large, highly urbanized metropolitan areas positions it as a natural base for guests looking to enjoy nature and the unique character of the region. Hocking County reflects the Appalachian region's rich history of coal mining, agriculture, and craftsmanship,

Hocking County's "product" for visitors includes outdoor recreation, family-friendly events and festivals, and opportunities to experience traditional Appalachian music, art, and cuisine. Several towns and villages within the county offer retail, dining, and other visitor services.

Hocking Hills State Park

Hocking Hills State Park is the predominant demand driver for visitation to the county. Old Man's Cave, a recess cave with waterfalls and rock formations; Ash Cave, the largest recess cave in the state; and Cedar Falls, a picturesque waterfall surrounded by hemlock trees are frequently visited sites. The park also offers artifacts from Native American tribes who once inhabited the region.



Villages and Main Streets

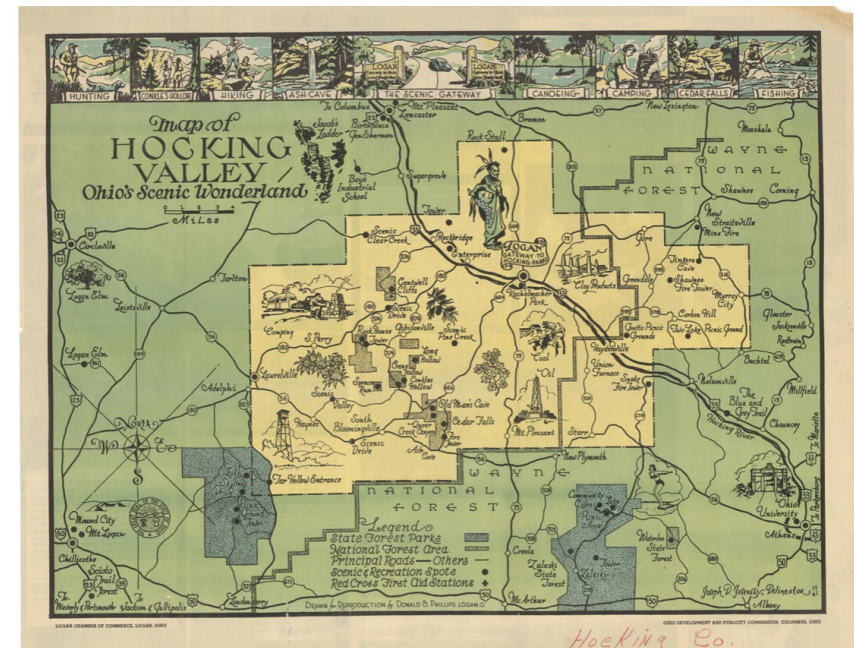
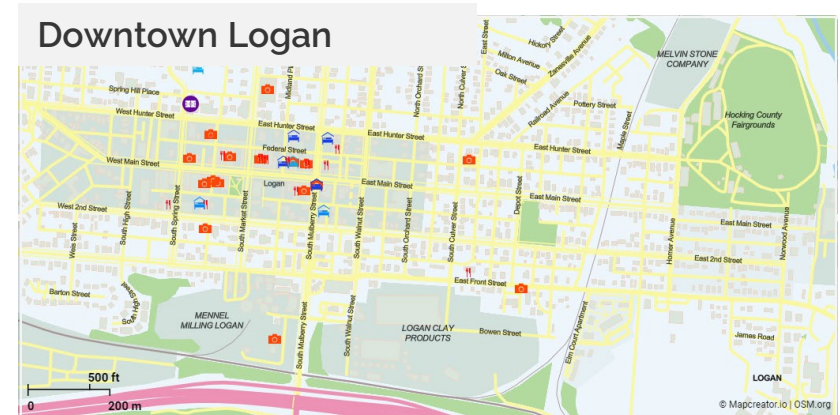
The county is home to a number of municipalities, including Laurelville, Murray City, and Logan. As the county seat, Logan is the largest of the municipalities. It is centrally located and serves as a hub for commerce, government, and services in the area. Logan has a charming downtown

Events and Festivals

Several annual events and festivals occur in the county throughout the year to serve residents, as well as to attract visitors to the region.

Examples of events that draw visitors include:

- Hocking Hills Winter Hike: Held in January, the 6-mile hike is from Old Man's Cave to Ash Cave. The 2024 event was the 58th annual hike.
- Washboard Music Festival: Held in June in Logan, the festival celebrates the history and heritage of the washboard and its use as a common musical instrument in Appalachian music.
- Hocking Hills Trail Run: Held in September, this annual trail race offers 60K, 40K, 20K, 10K, or 5K races. The longer races begin in Hocking Hills State Park

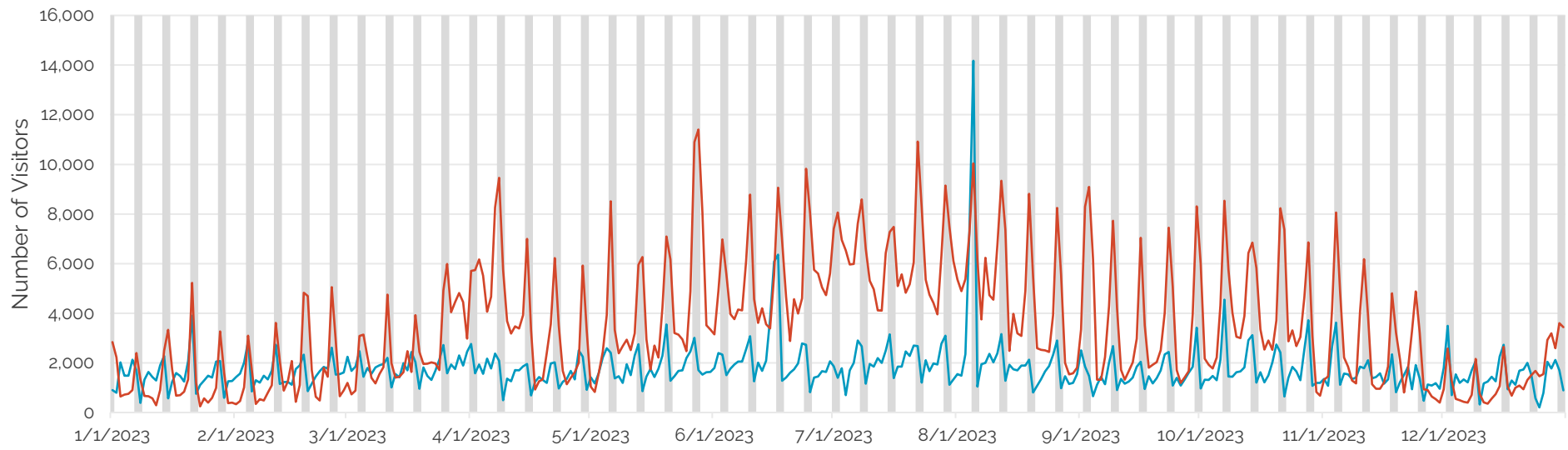


VISITATION TRENDS

To understand the level of visitation in Hocking County, Clarity of Place examined Points of Interest (POI) defined by Hocking Hills Tourism Association to gauge the volume of visitors to the county's two largest demand drivers—Hocking Hills State Park and downtown Logan. Tracking visitation to Hocking Hills State Park is difficult due to the multiple access points. There is no entrance fee to enjoy the park; hence, there is no ticketing data. Multiple sources estimate that between 2.2 and 4 million guests visit the Park each year. Geolocation tracking data provide some trends in visitation patterns but highly discounts the true number of visitors given inconsistent cellular coverage.

Nevertheless, to understand the rough breakdown of visitors to Hocking Hills State Park, data from Placer.ai -- a location analytics platform -- was used. While not counting all visitors (given the aforementioned limitation of the data tracking), Placer.ai data suggests that the Hocking Hills State Park welcomed at least 1.3 million visitors in 2023. Visitation by visitors tracked by Placer.ai peaked during the weekends and the largest percentage of visitors have home addresses within 75 miles of the park. Placer.ai visitor tracking to Downtown Logan shows similar weekend trends, but peak visitation corresponded with special events (e.g., visitation to downtown was approximately 5,800 on August 4, 2023 during the Big Foot Festival, compared to an annual daily average of 1,345). Most visitors to Downtown Logan have home addresses within 75 miles of the city.

Daily Visitor Geolocation Tracking

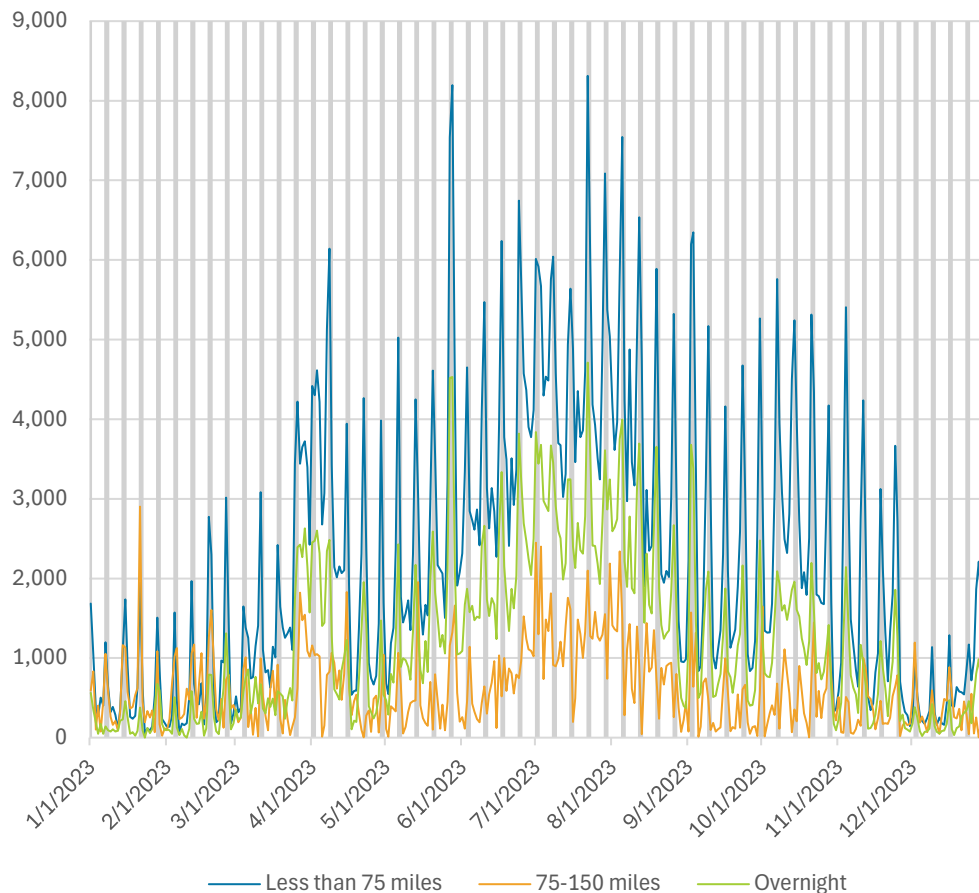


Source: Placer.ai Data, Jan 1 – Dec 31, 2023

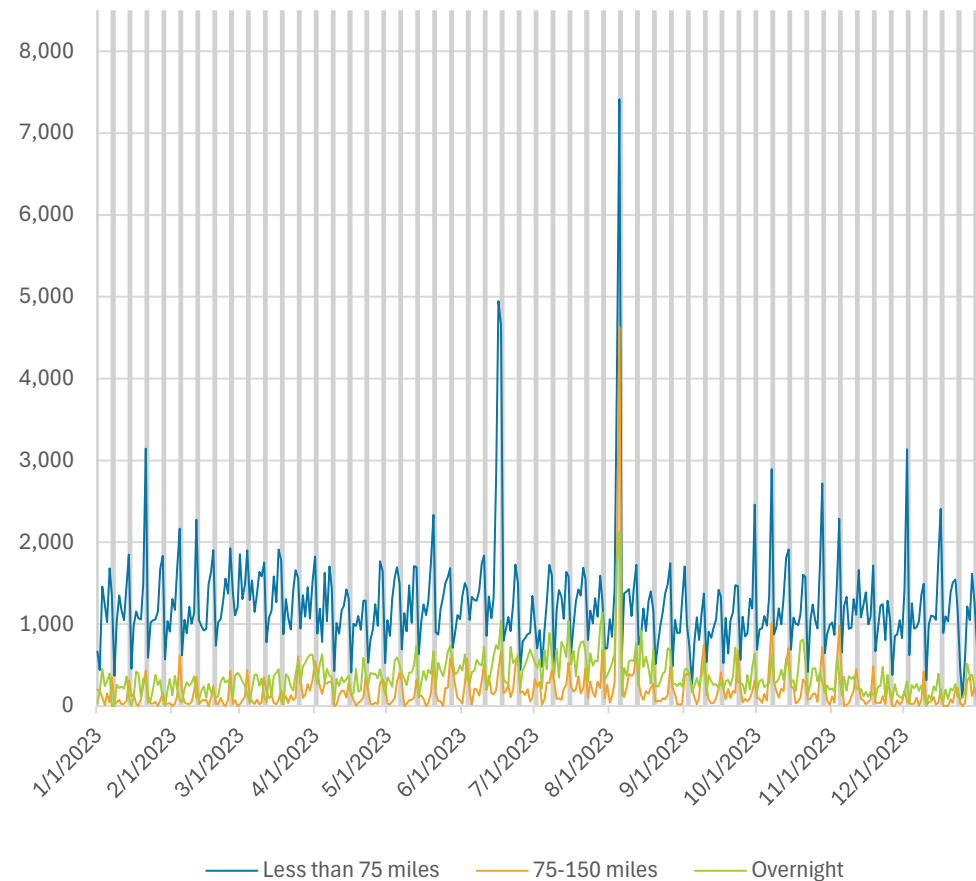
Clarity of Place then filtered the visitation data for the two POI to understand the make-up of those visitors. For each POI, the largest percent of visitors have a home address within a 75-mile radius of the POI—with the exception of the last weekend in January when visitors from more than 75-miles from the park were the majority.

Visitors whose home address is more than 150-miles from the POI are assumed to be overnight visitors. Visitors traveling to the Hocking Hills from home addresses between 75 and 150 miles are assumed to be day-visitors. For all visitor types, visitation peaks during the weekends (as indicated by the gray shading).

Hocking Hills State Park
Seasonal Trends by Distance including Overnight



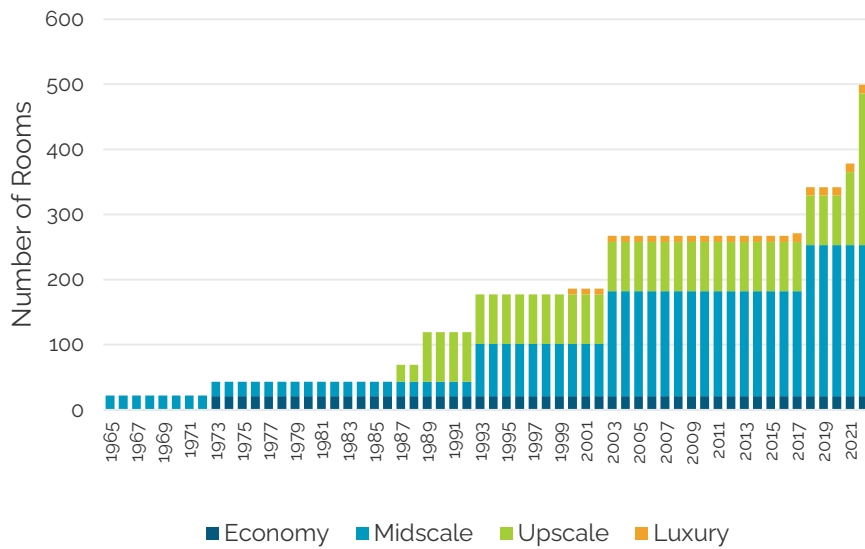
Downtown Logan
Seasonal Trends by Distance including Overnight



LODGING

Hocking County offers a mix of hotel, Bed & Breakfast, and cabin/lodge options. By volume, cabins provide the largest lodging supply. Some cabins are located within an established campground; others are located throughout the county on private property. Similarly, some cabins are managed by a property company; others are offered to visitors through short-term rental sites such as Airbnb or Vrbo.

Hotel Room Supply Growth

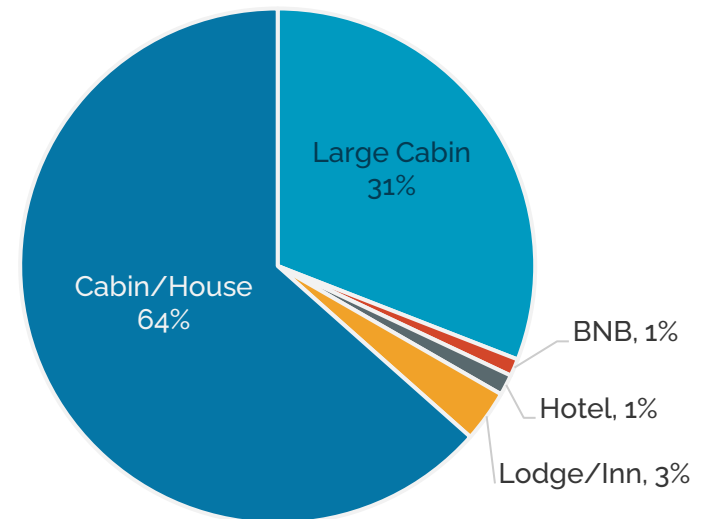


Source: CoStar, Clarity of Place

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Destination Stewardship Plan - Appendix

Lodging Breakdown



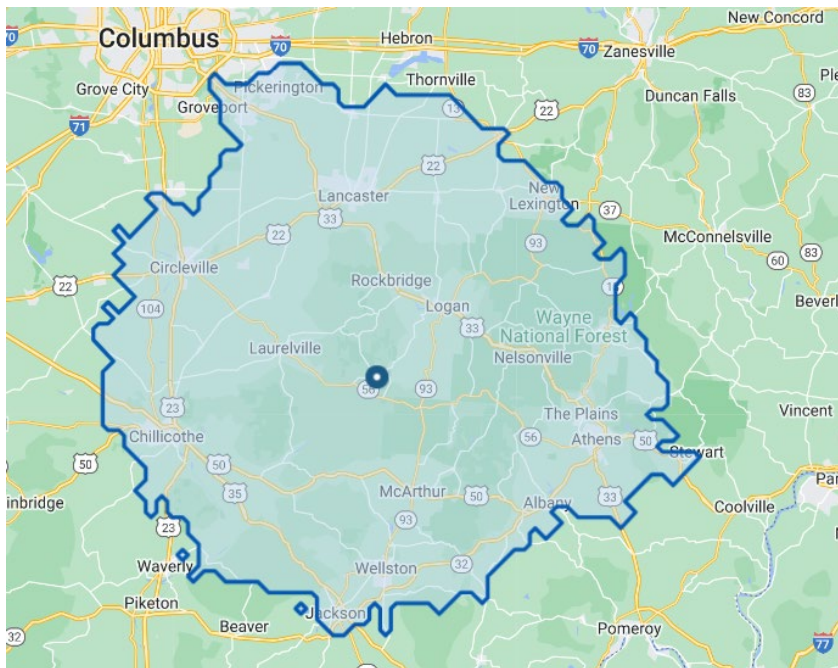
Source: HHTA, Clarity of Place

TRANSPORTATION INFRASTRUCTURE

Hocking County is located in southeastern Ohio. In 2023, the region within a 75-mile radius of downtown Logan has a population of roughly 3.2 million according to the US Census Bureau. The junction of Interstate 270 and Highway 33 is within an hour-drive of Hocking Hills State Park.

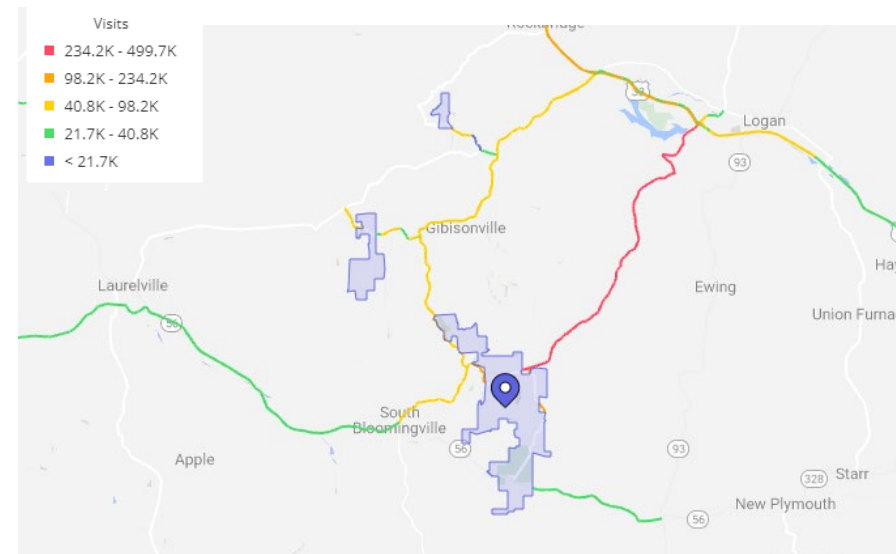
Hocking County has approximately 413 miles of roads maintained by townships and municipalities and 212 miles of road maintained by the county. Hwy 33 provides access to downtown Logan and is north of the park. Hwy 56 runs east-to-west just south of South Bloomington and the park; State Hwy 93 runs north to south between highways 33 and 56 to the east of the park. On average throughout the year, SR 664 is heavily used to access the park

Hour Drive Radius from Hocking Hills State Park



Source: CoStar

2023 Road-use by Visitors to Hocking Hills State Park



Source: Placer.ai

LODGING TAX USAGE

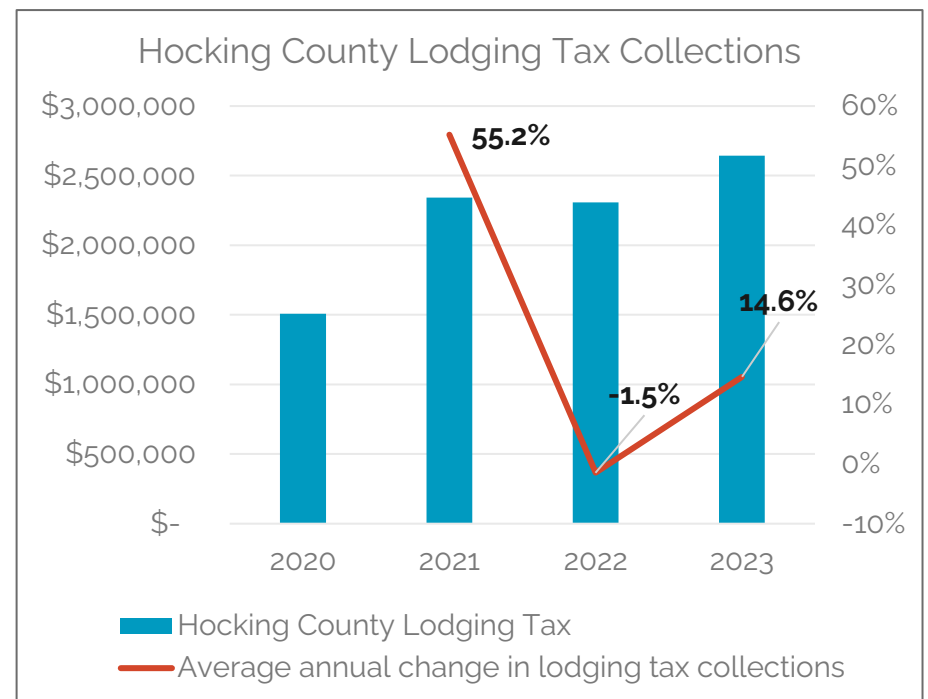
Chapter 5739 of the Ohio Revised Code governs the use of lodging tax revenues by counties; local ordinances or regulations adopted by individual municipalities and counties within Ohio vary. The State of Ohio has permitted the enactment of several special lodging tax levies to fund designated purposes or projects. In these instances, it is possible for the maximum combined rate to exceed 6 percent.

The Ohio Revised Code permits local governments to levy a tax on lodging furnished to guests of hotels, motels, and lodging properties (including cabins, Airbnb, and Vrbo properties) within that local jurisdiction. Hocking County levies a lodging tax of 3.0 percent; municipalities within the county can levy an additional tax of up to 3 percent.

For most municipalities and townships in Ohio, revenue from the lodging tax goes to the general revenue fund. For municipalities or townships in counties that levy the 3 percent tax (such as Hocking County), at least 50 percent of the revenues from the additional tax are allocated to the convention and visitor's bureau (destination organization) operating within the county. If a municipality or township does not levy an additional lodging tax, the county is required to return a uniform percentage (not to exceed 33 1/3 percent) of the revenue from the county lodging tax generated by

properties within the municipality or township. The remainder of the revenue is deposited in a separate fund to be used for county convention and visitors' bureau expenses.

Ohio law typically outlines the authorized uses of lodging tax revenues. These authorized uses often include promoting tourism and conventions, supporting tourism-related facilities and activities, funding cultural or recreational programs, and enhancing local economic development efforts related to tourism.

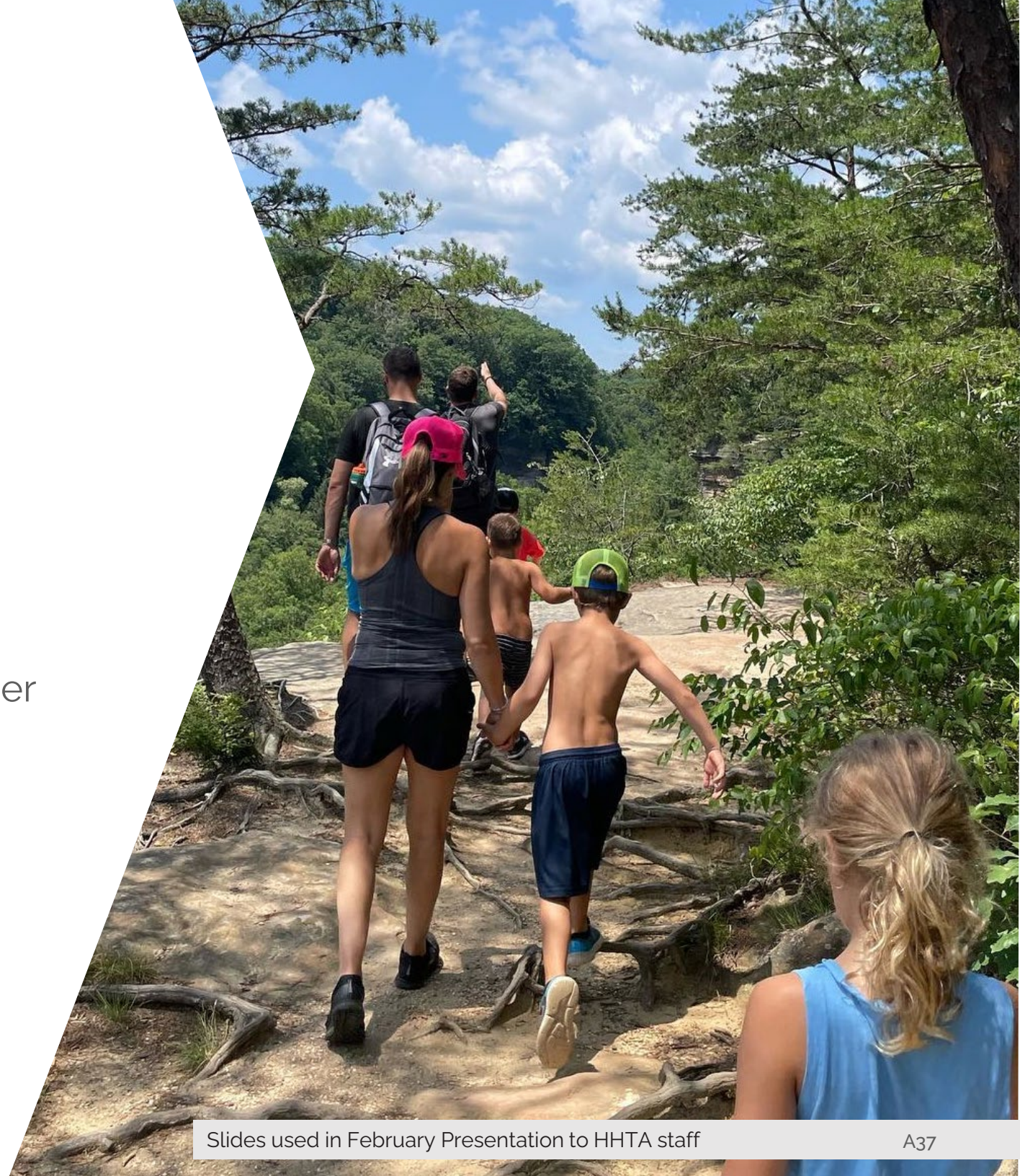






Next Steps

Resident and Stakeholder
Survey Results



Agenda

1. Review outcomes from Board engagement
2. Review updated Stakeholder Survey results
3. Review updated Resident Survey results
4. Data compilation
5. Select dates for presenting
6. Discuss format options for direction

Stakeholder Survey Results

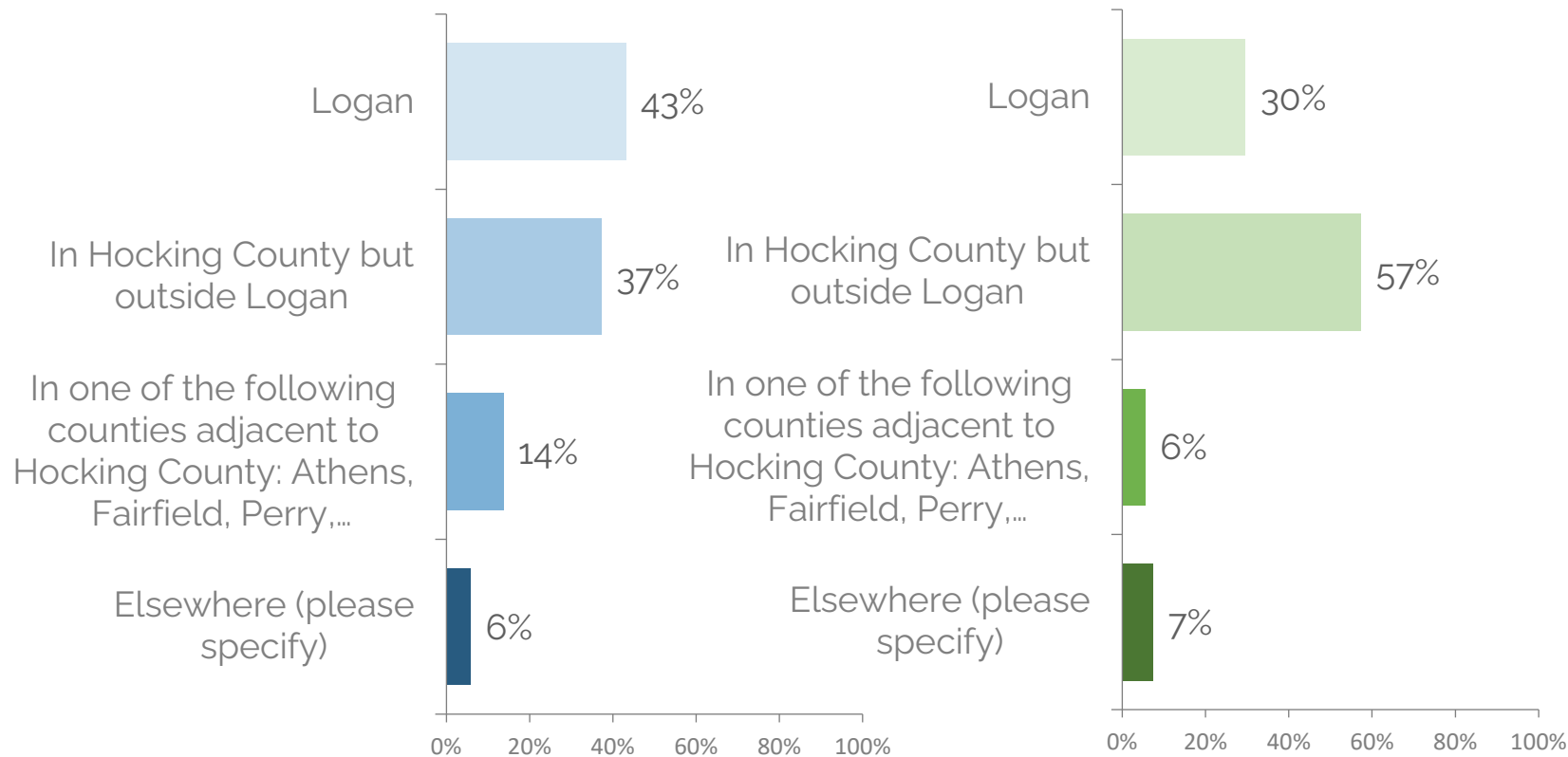
153 responses (online only)

54 accommodations

Stakeholder Location | Stakeholder Location

ALL RESPONDENTS ACCOMMODATIONS ONLY

Q1. Where is the business or organization located?



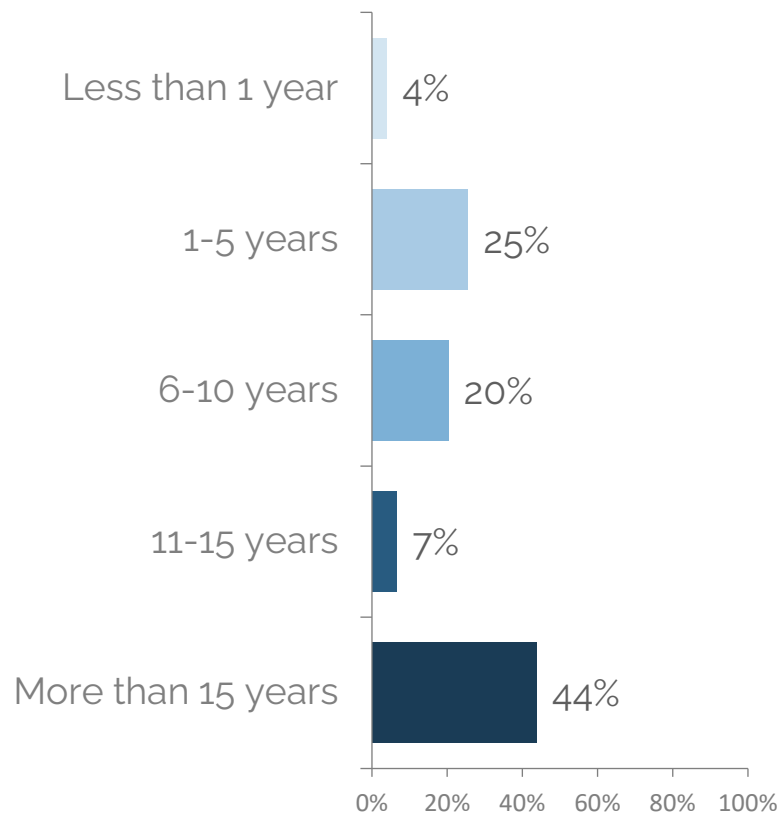
- Answered: 153
- Skipped: 0

- Answered: 54
- Skipped: 0

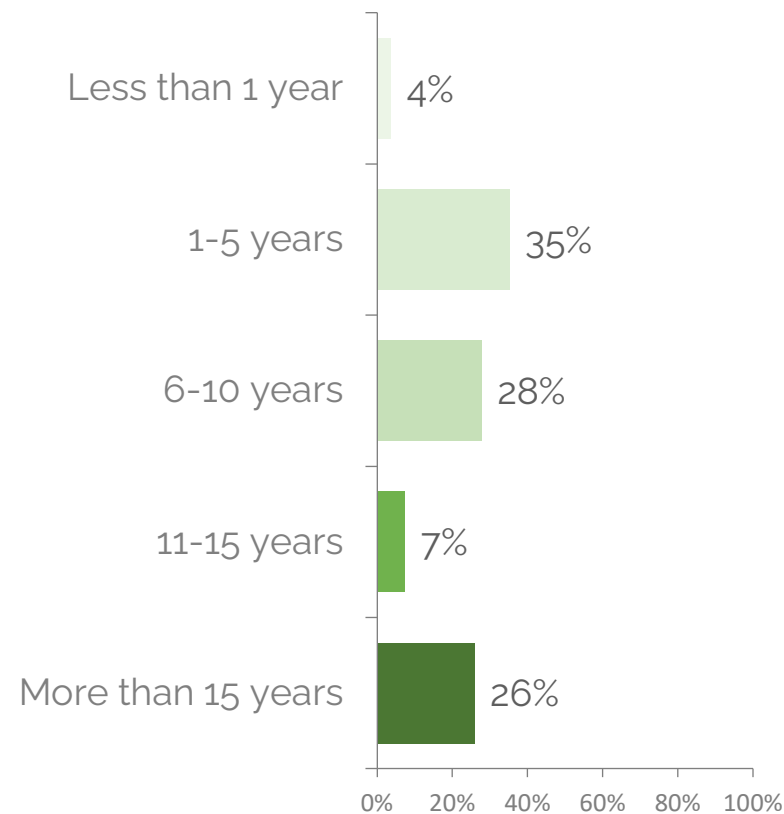
Length of Operation | Length of Operation

ALL RESPONDENTS ACCOMMODATIONS ONLY

Q3. How long has this business or organization been operating in the Hocking Hills? (select one)



- Answered: 153
- Skipped: 0

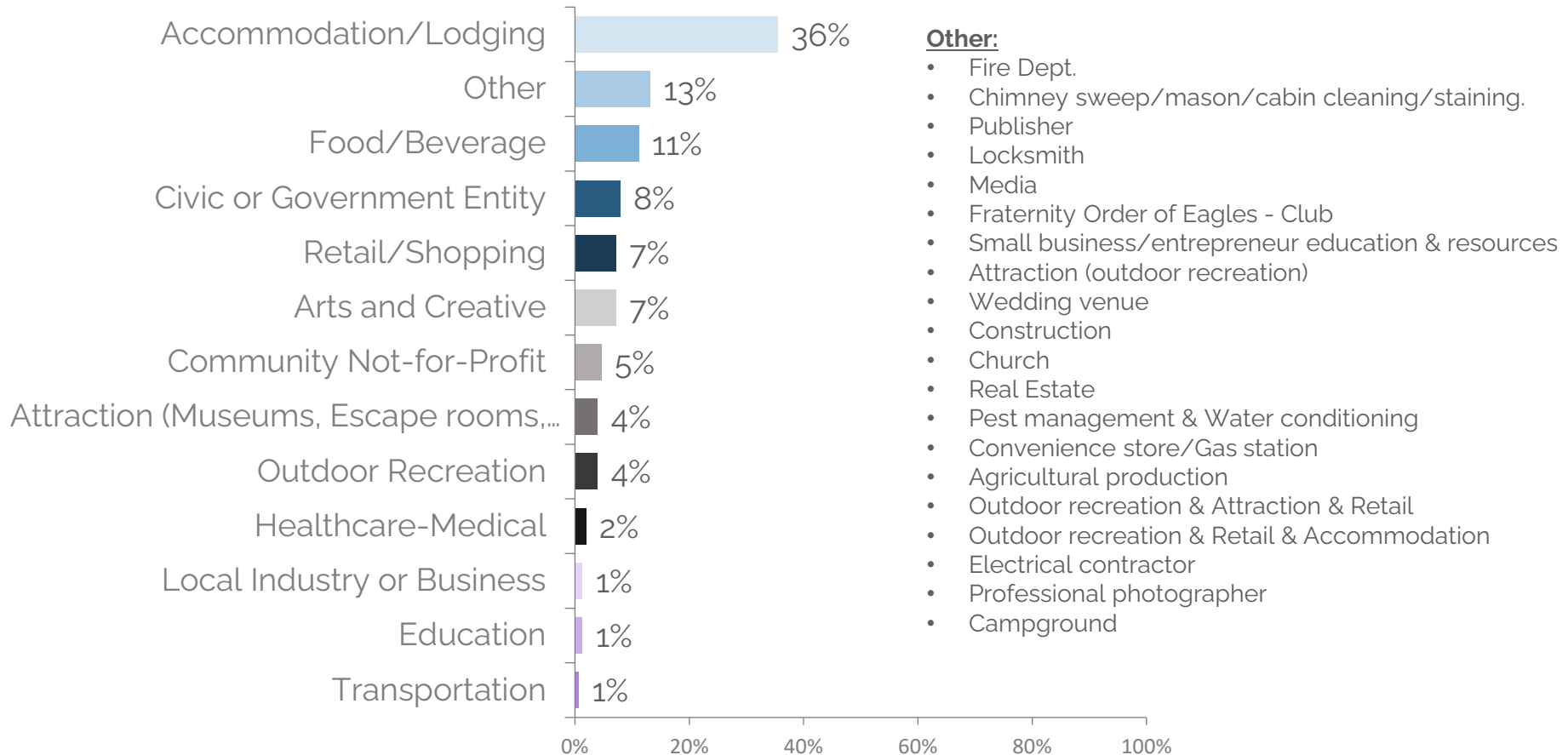


- Answered: 54
- Skipped: 0

Organization Type

ALL RESPONDENTS

Q4. What type of community organization or tourism-related business are you? (Select the most appropriate descriptor)

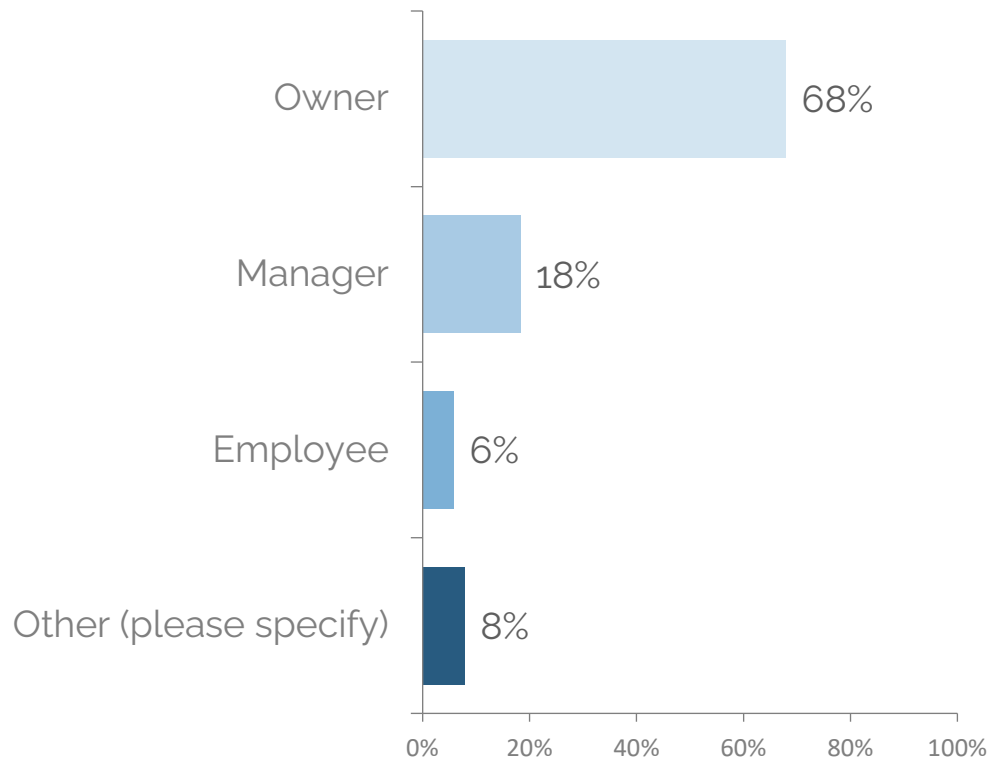


- Answered: 152
- Skipped: 1

Respondent Role | Resident vs. Non-resident

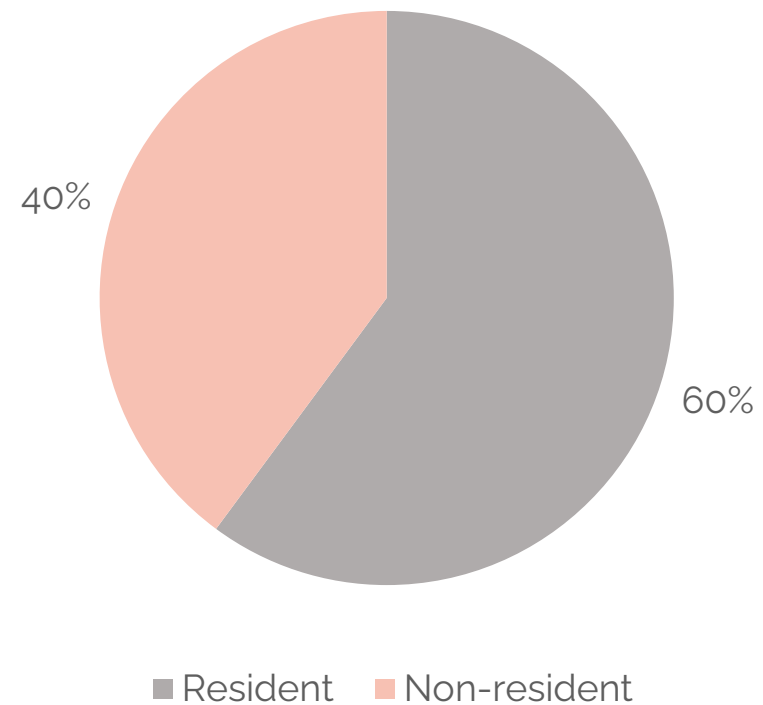
ALL RESPONDENTS

Q2. What is your job or role?



- Answered: 153
- Skipped: 0

Q13. Are you a resident of Hocking County?

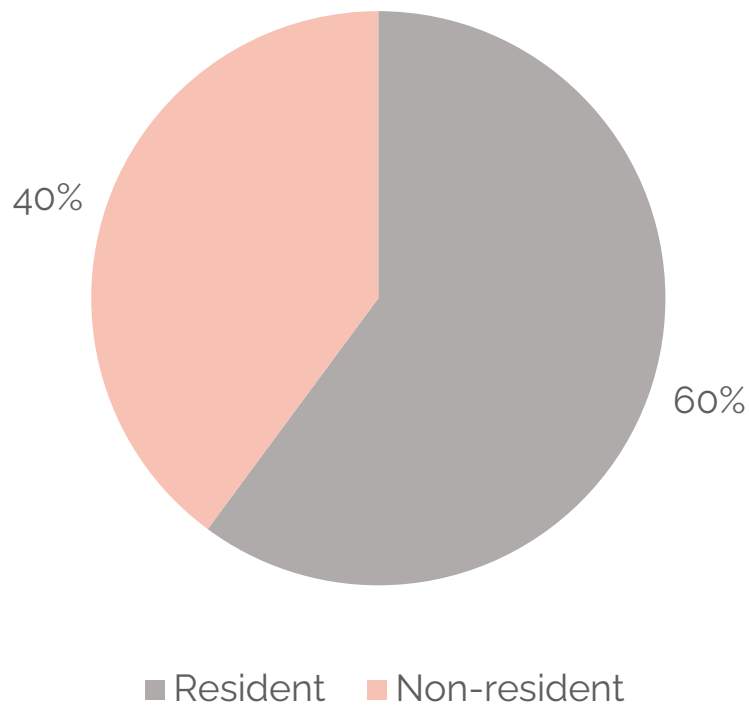


- Answered: 153
- Skipped: 0

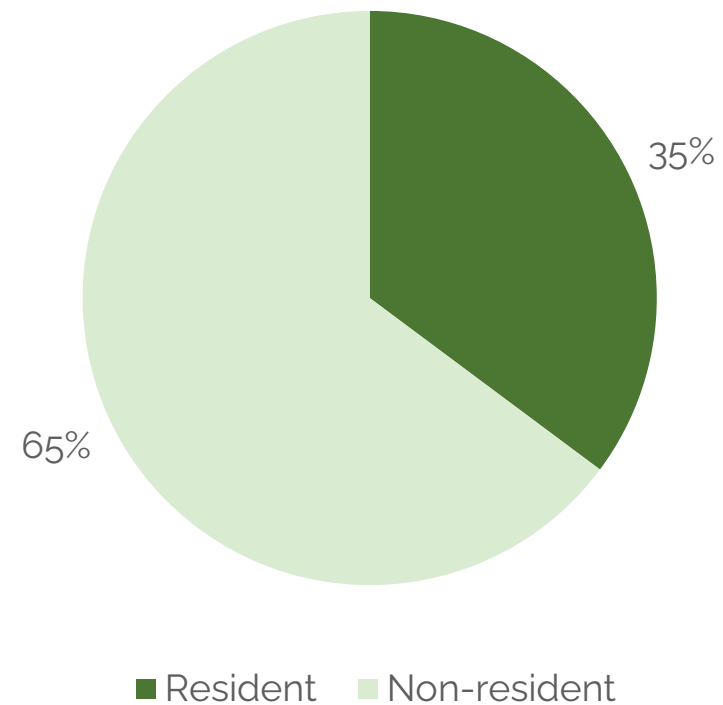
Resident vs. Non-resident | Resident vs. Non-resident

ALL RESPONDENTS ACCOMMODATIONS ONLY

Q13. Are you a resident of Hocking County?



- Answered: 153
Skipped: 0

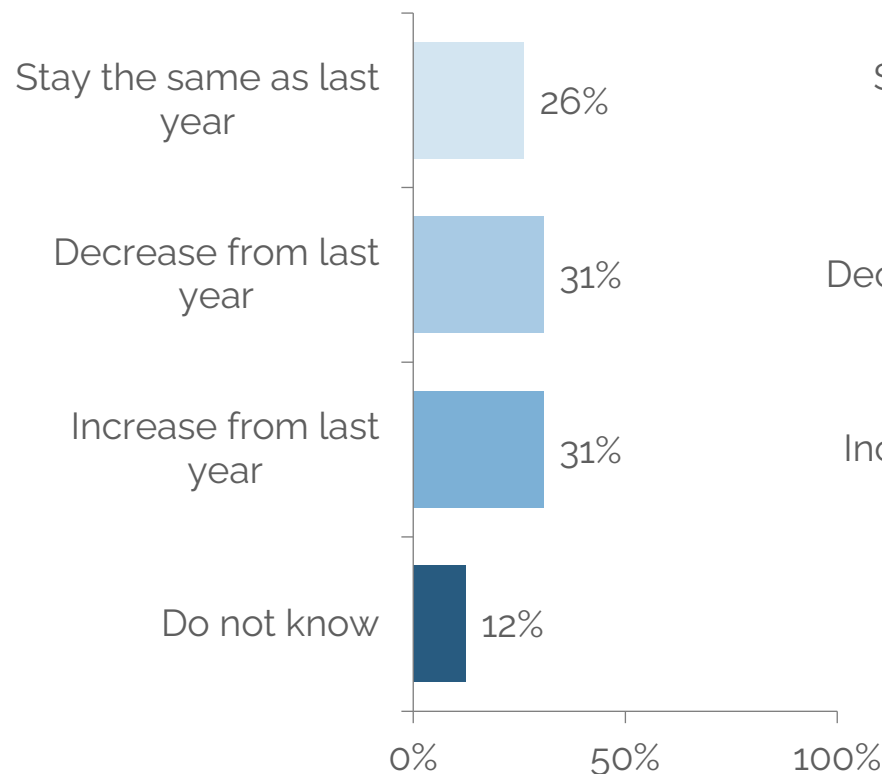


- Answered: 153
Skipped: 0

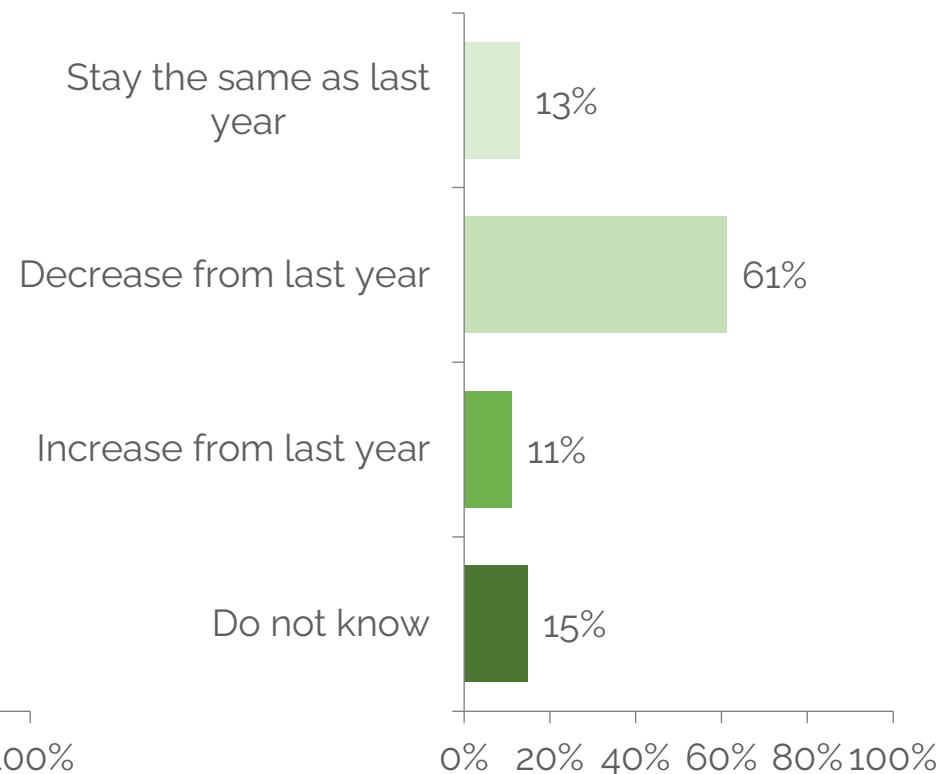
2023 Business Volume ALL RESPONDENTS

2023 Business Volume ACCOMMODATIONS ONLY

Q6. Looking back at 2023, did you observe visitation or business volume at your organization or business: (select one)



- Answered: 153
Skipped: 0

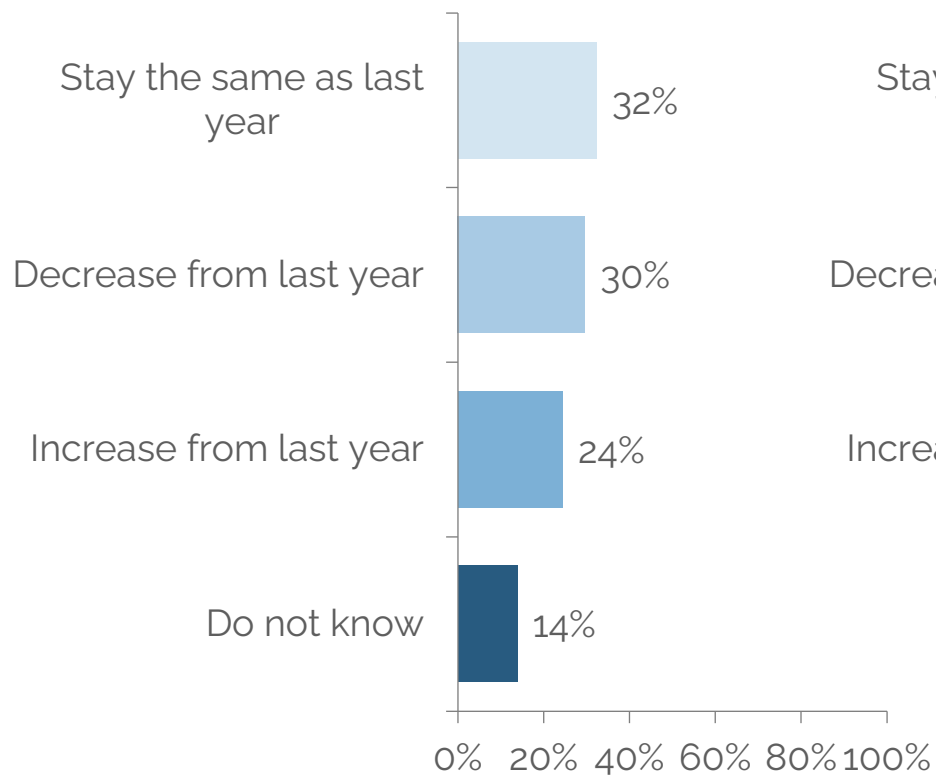


- Answered: 54
Skipped: 0

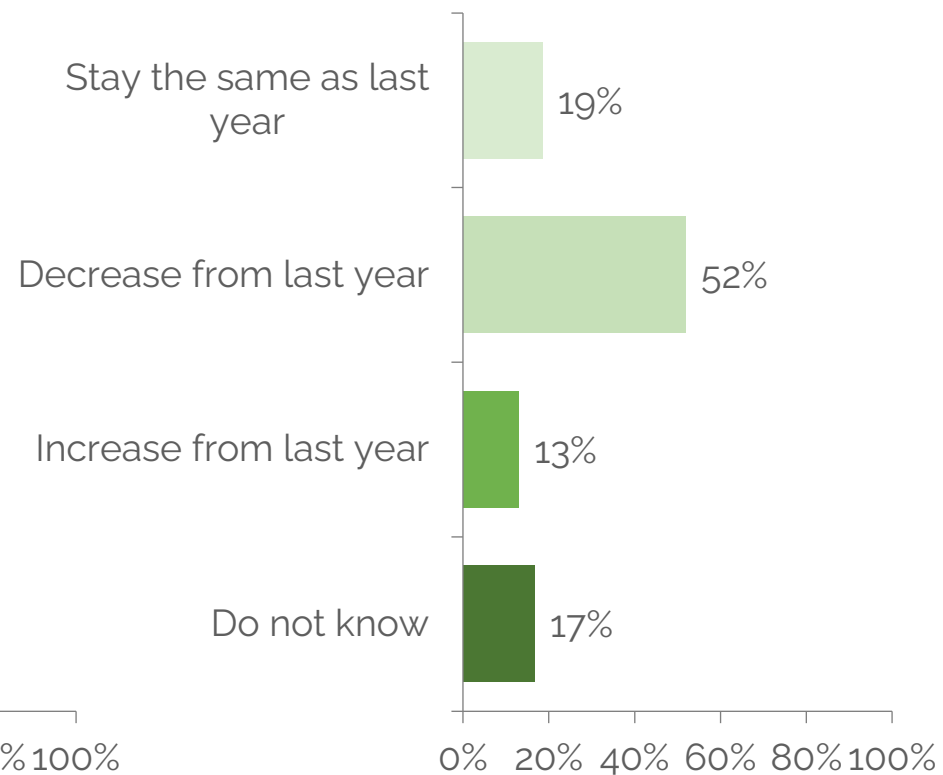
2023 Revenue ALL RESPONDENTS

2023 Revenue ACCOMMODATIONS ONLY

Q7. Looking back at 2023, did you observe revenue at your organization or business: (select one)



- Answered: 153
Skipped: 0

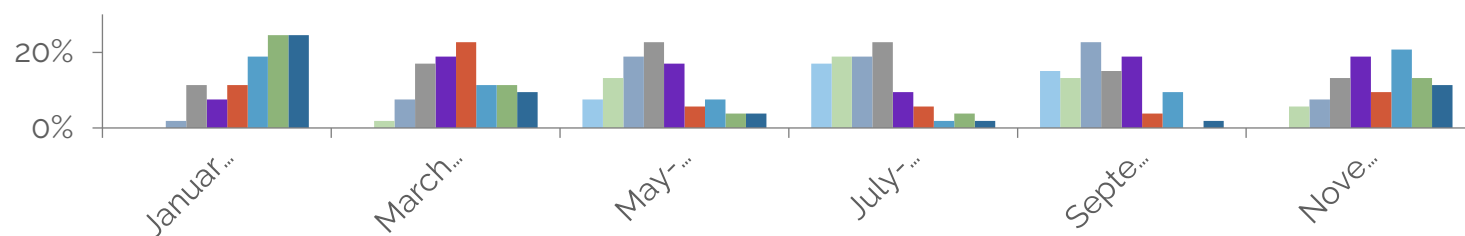


- Answered: 152
Skipped: 1

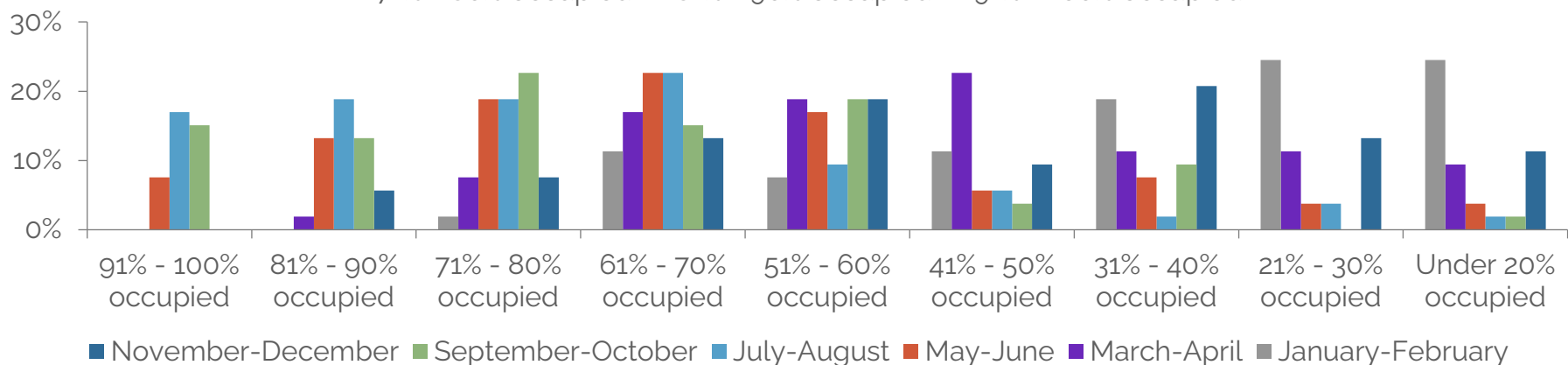
Reported 2023 Occupancy

ACCOMMODATIONS ONLY

Q5. Please provide a rough assessment of your overall 2023 lodging occupancy for each of the following 2-month cycles:



Under 20% occupied 21% - 30% occupied 31% - 40% occupied
 41% - 50% occupied 51% - 60% occupied 61% - 70% occupied
 71% - 80% occupied 81% - 90% occupied 91% - 100% occupied



November-December September-October July-August May-June March-April January-February

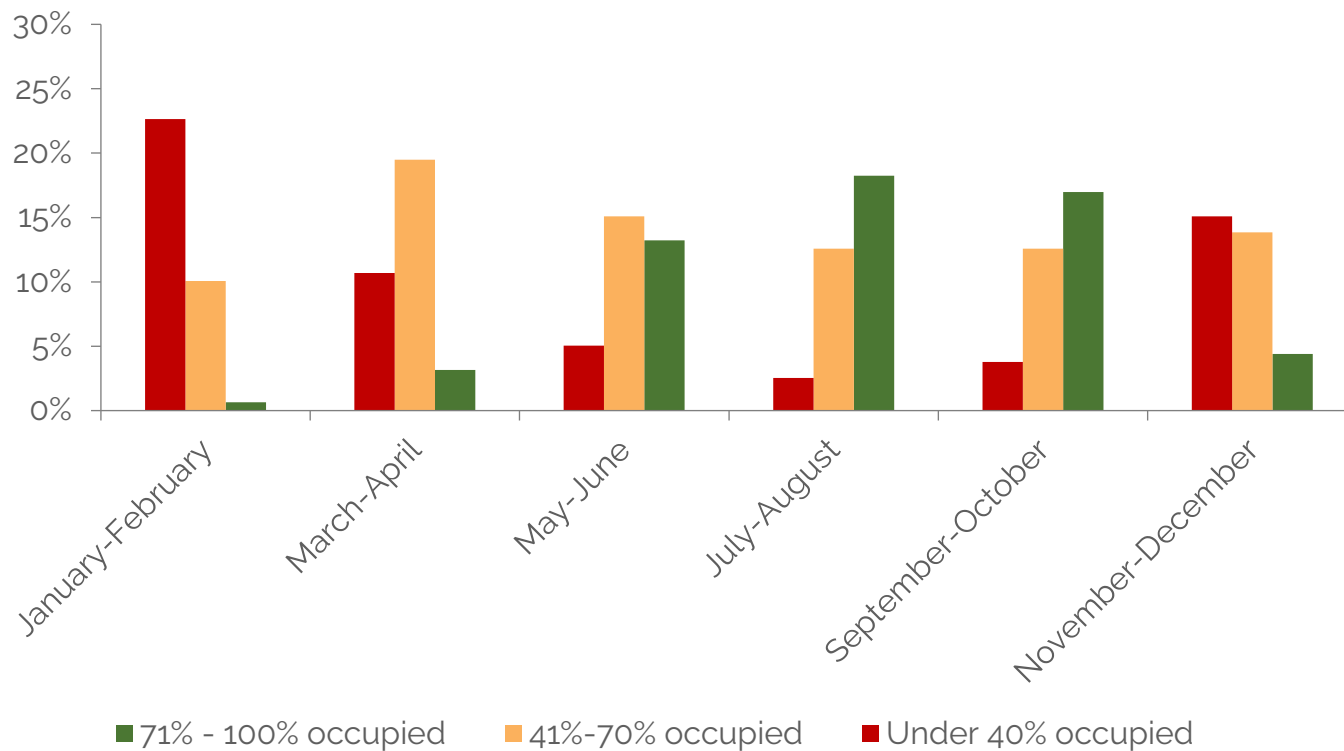
• Answered: 54

Skipped (Non-accommodations): 99

Reported 2023 Occupancy - Condensed

ACCOMMODATIONS ONLY

Q5. Please provide a rough assessment of your overall 2023 lodging occupancy for each of the following 2-month cycles:

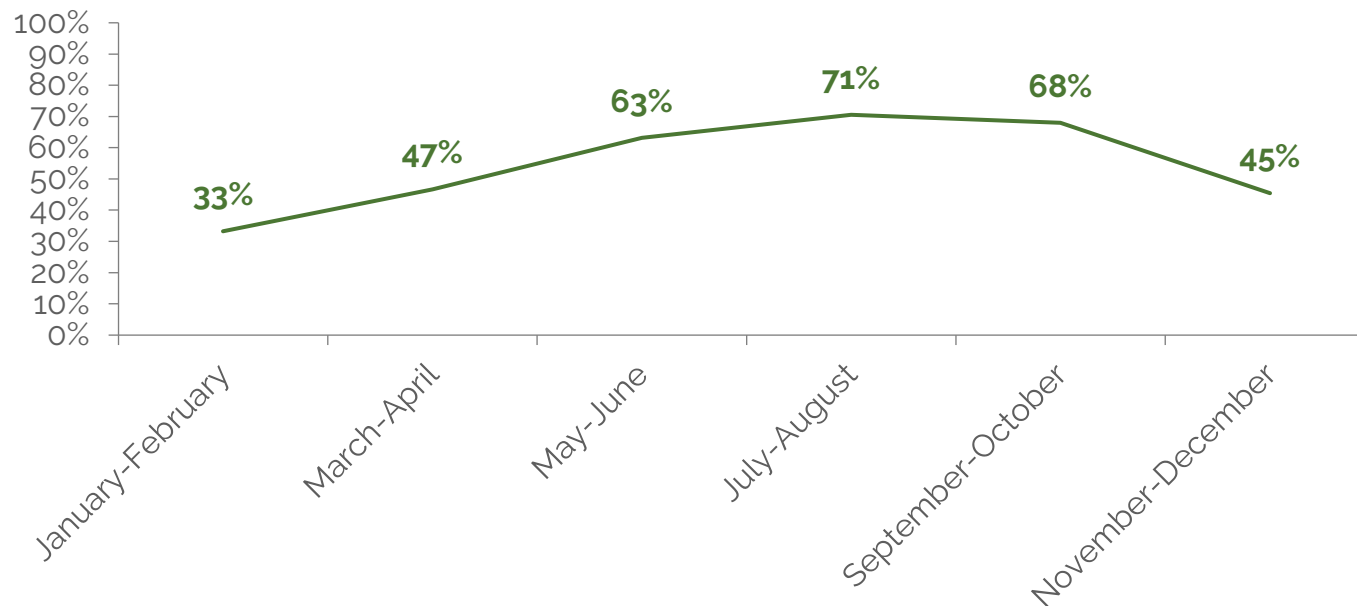


■ 71% - 100% occupied ■ 41%-70% occupied ■ Under 40% occupied

- Answered: 54
- Skipped (Non-accommodations): 99

Average Projected 2023 Occupancy

ACCOMMODATIONS ONLY

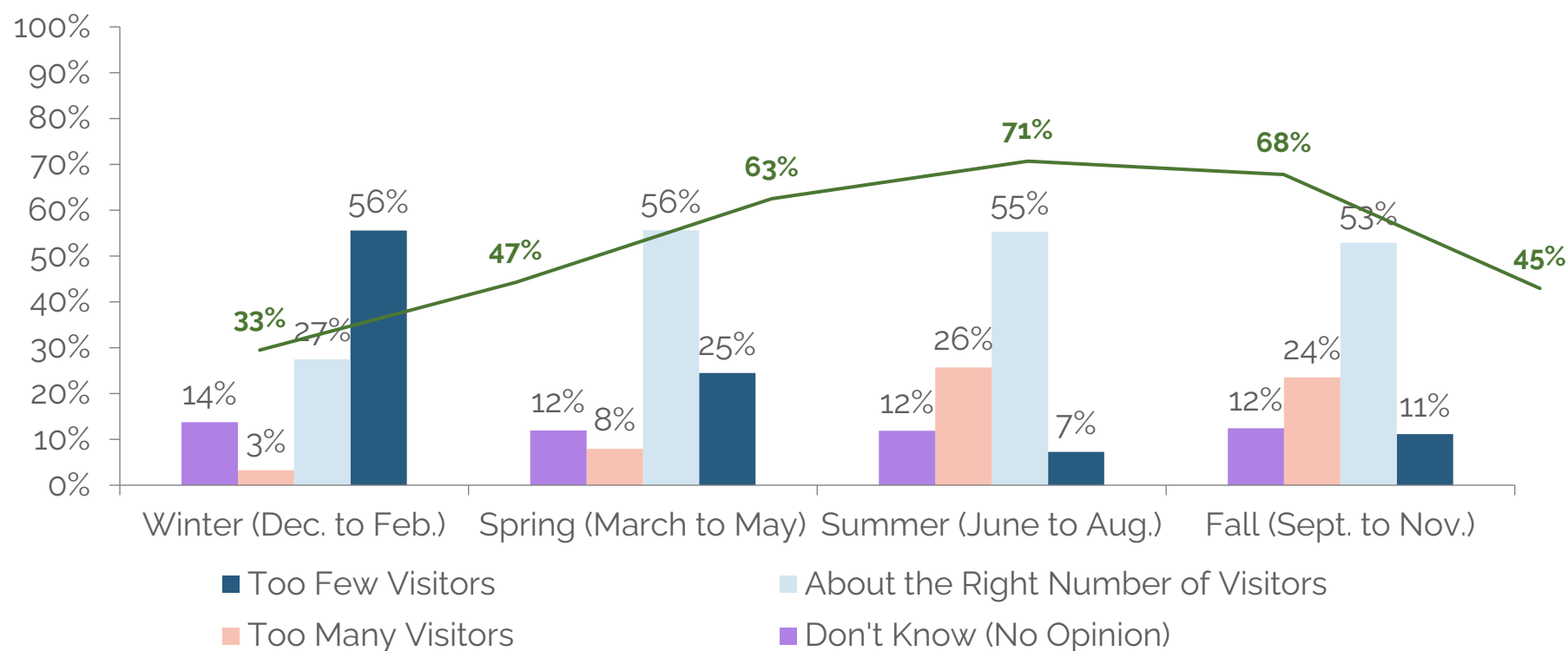


- Answered: 54
- Skipped (Non-accommodations): 99

Perceived Seasonal Volume | Avg. Projected Occupancy

ALL RESPONDENTS

ACCOMMODATIONS ONLY



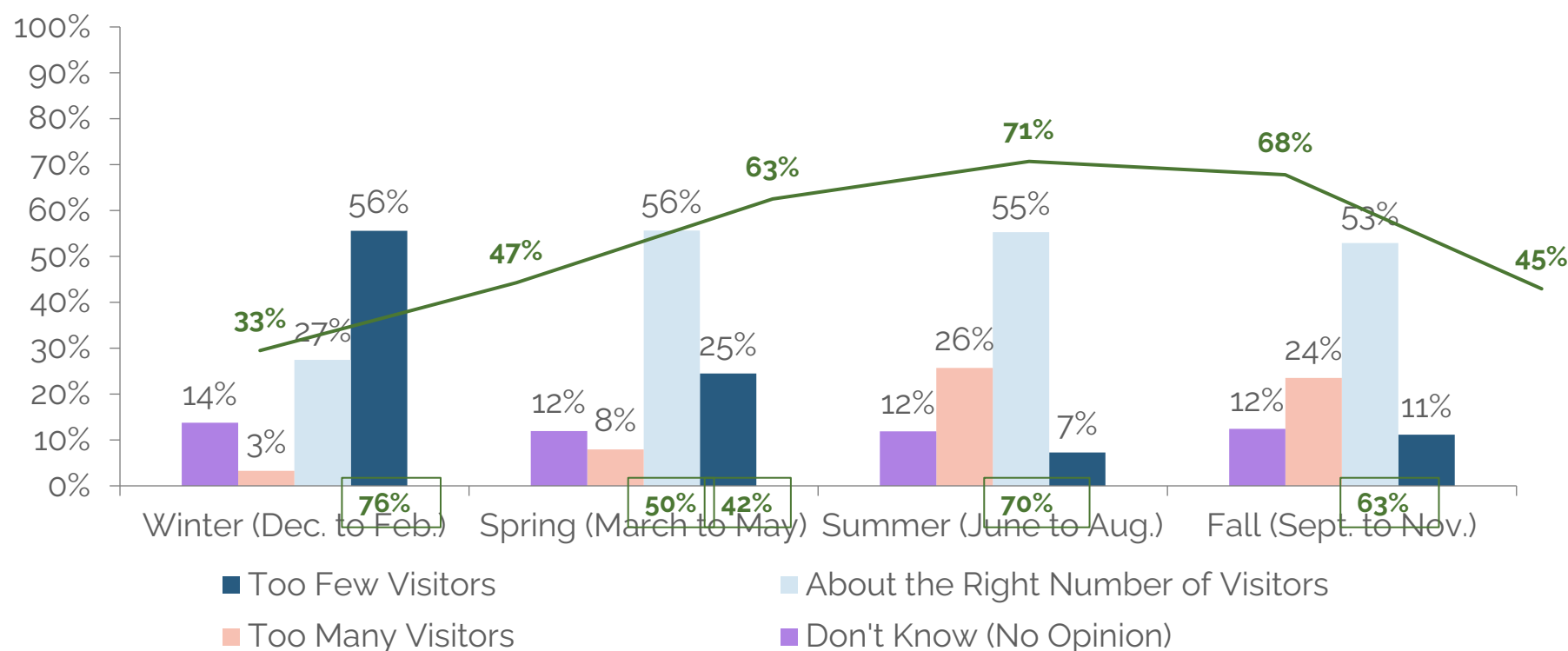
• Answered: 153 Skipped: 0

Perceived Seasonal Volume

ALL RESPONDENTS

ACCOMMODATIONS ONLY

Q8. With respect to the number of visitors that Hocking Hills welcomes each season, would you say there are: (Select one per row)

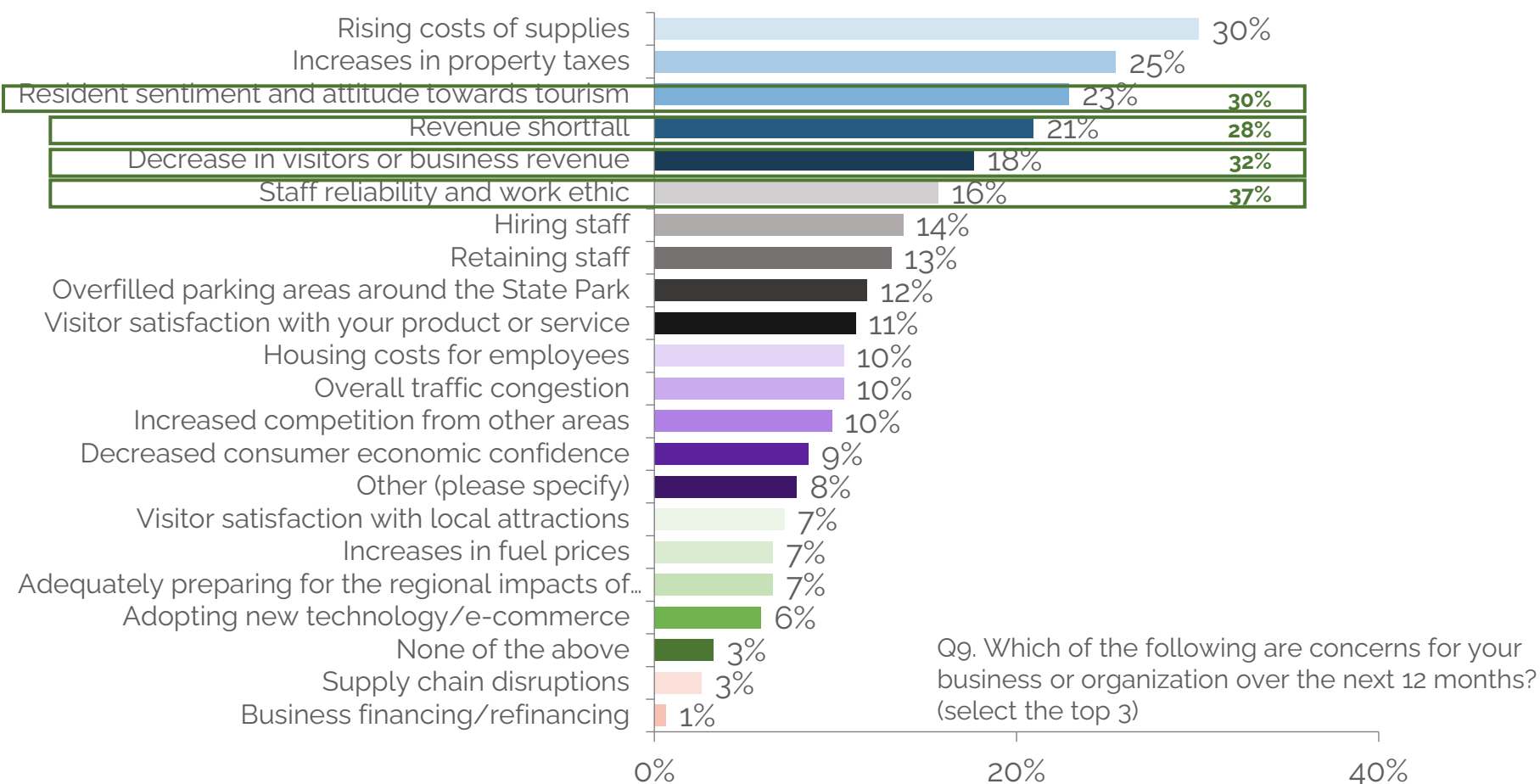


- Answered: 153
- Skipped: 0

Business Concerns Over Next 12 Months

ALL RESPONDENTS

ACCOMMODATIONS ONLY



- Answered: 153
- Skipped: 0

Business Concerns Over Next 12 Months - Other

ALL RESPONDENTS

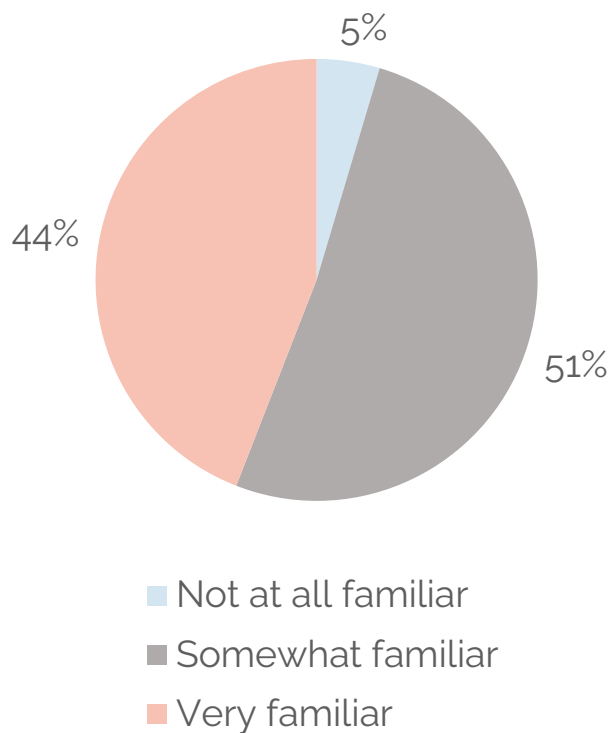
- Downtown Logan has so much potential and needs to get more people living/staying the night downtown along with more businesses and less empty buildings. Elected officials need to be more business friendly.
- We struggle with marketing/PR and nobody seems willing to help us when we ask for help.
- More than just overfilled parking I worry about the quality of the state parks themselves. Perhaps that's what the quality of attractions meant, but we are in the attractions business and feel that statement is misleading. Do they mean "quality of the parks and trails" or do they mean the "quality of the horse riding or ziplining or climbing"?
- Places to stay has out numbered the visitors. Everyone wants to have an Airbnb. Quality of places being rented has dropped majorly. I see this as a big downfall to our area.
- 2 things: 1) Inability to find building maintenance contractors and 2) continuing to try to find reliable and adequate internet service
- Impact that Cultivate, as a nonprofit, can make to empower small businesses to thrive in Hocking Hills
- My design business doesn't market to visitors directly
- Being able to draw more visitors to our retail location in Lancaster.
- Hemlock Woolly Adelgid
- Almost all of the above
- Finding a new location
- Increasing local competition

• Answered: 153
Skipped: 0

Familiarity

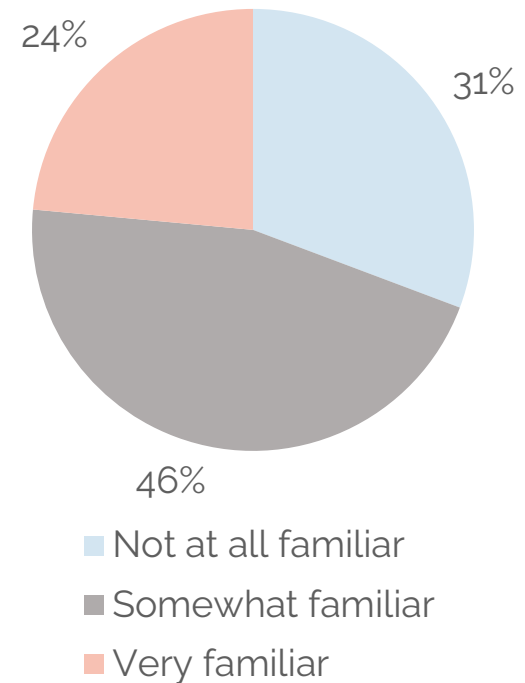
ALL RESPONDENTS

Q10. How familiar are you with the Hocking Hills Tourism Association's efforts to market the area?



- Answered: 152
Skipped: 1

Q11. How familiar are you with the Hocking Hills Tourism Association's tourism stewardship efforts?

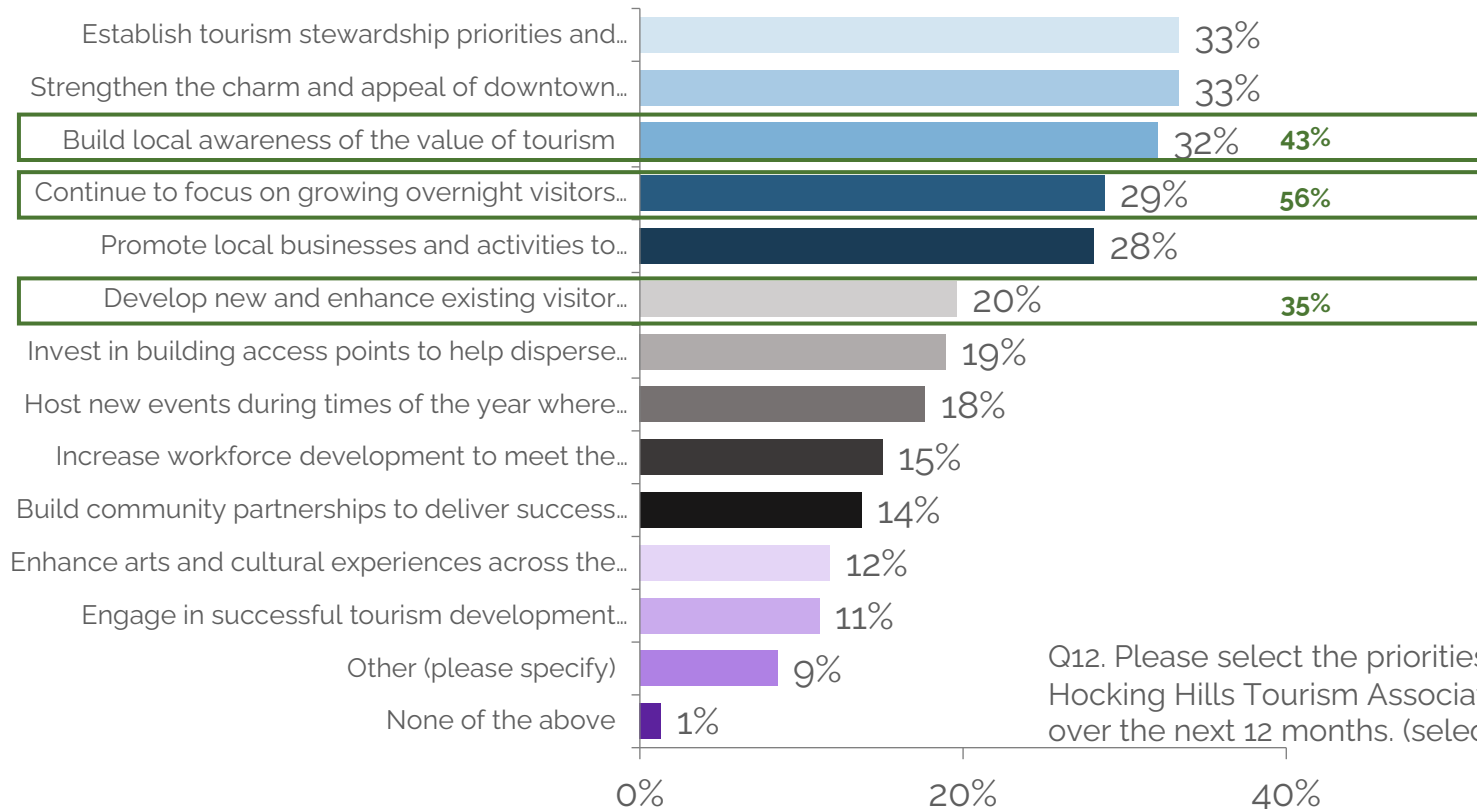


- Answered: 153 Skipped: 0

Priorities For HHTA Over Next 12 Months

ALL RESPONDENTS

ACCOMMODATIONS ONLY



Q12. Please select the priorities below that you think Hocking Hills Tourism Association should pursue over the next 12 months. (select the top 3)

- Answered: 153
- Skipped: 0

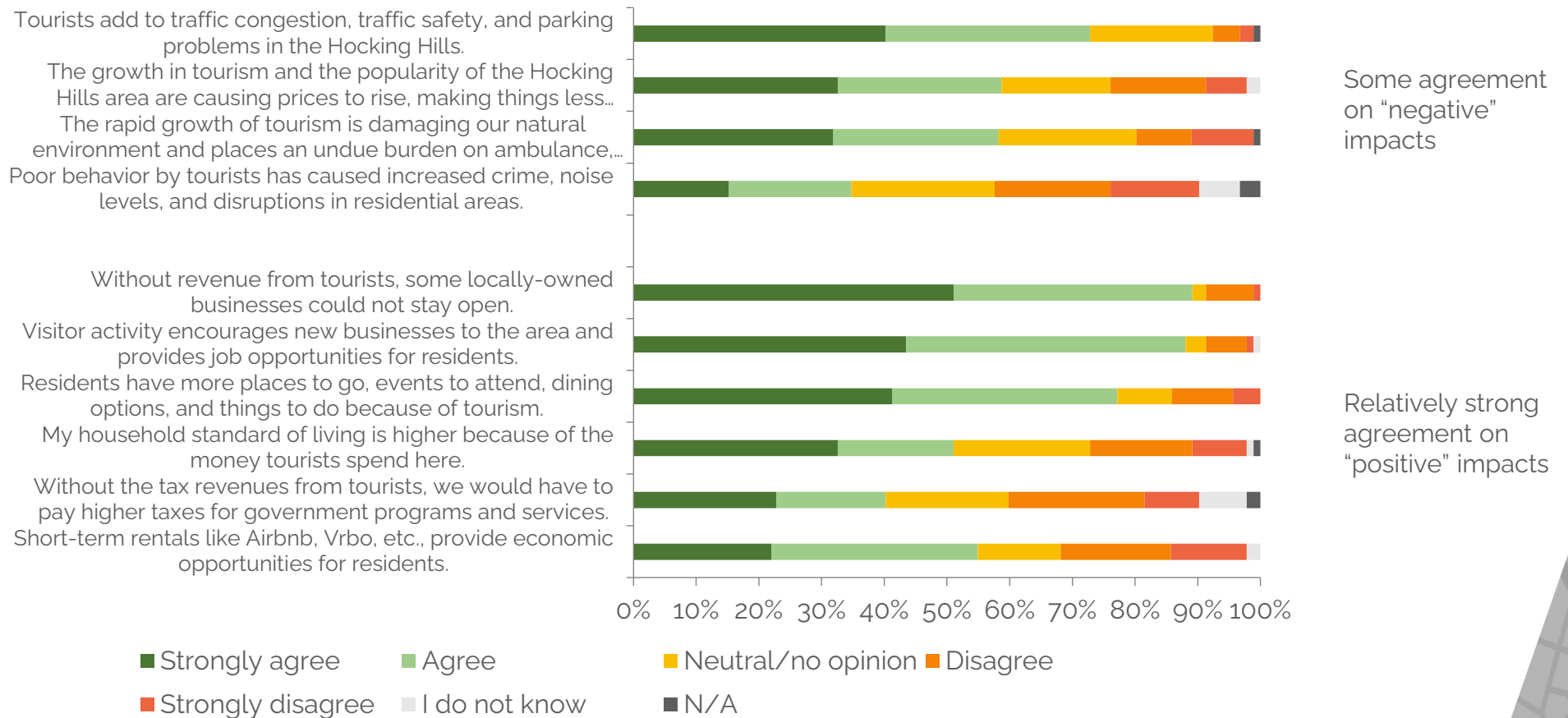
Priorities For HHTA Over Next 12 Months - Other

ALL RESPONDENTS

- Cultivate offers in-person training presentations to small business.
- Workshops to help businesses with marketing and PR.
- Take a look at the effectiveness of the current staff of Hocking Hills Visitors center. Almost all of the above
- They need to advocate for cabin owners. Their Board comes across as almost anti cabin owner
- Help the state understand they are degrading our main product by not having entrance restrictions especially during peak times and that based on the visitor numbers compared to similar national parks that receive 4-5 million visitors we need more parking, more trails, and more personnel out there helping to protect those resources from damage.
- More maps and guides that send visitors to secondary natural attractions, not just the well-known ones.
- I think that there should be pull-off areas for slow motorists to safely get off and on the road to help alleviate local road rage from local residents.
- Facilitate introductions between larger venues and major corporations currently undergoing construction in the Columbus area.
- Set parameters on number of lodging facilities and ensure ALL lodging facilities pay their fair share of taxes
- Spend less on your staff and more on promoting member businesses.
- Stay focused on just tourism
- Zoning
- Higher quality advertising & less radio

Effects of Visitor Economy

Q14. We know that the visitor economy affects our community in different ways. Please indicate your level of agreement with the following statements:



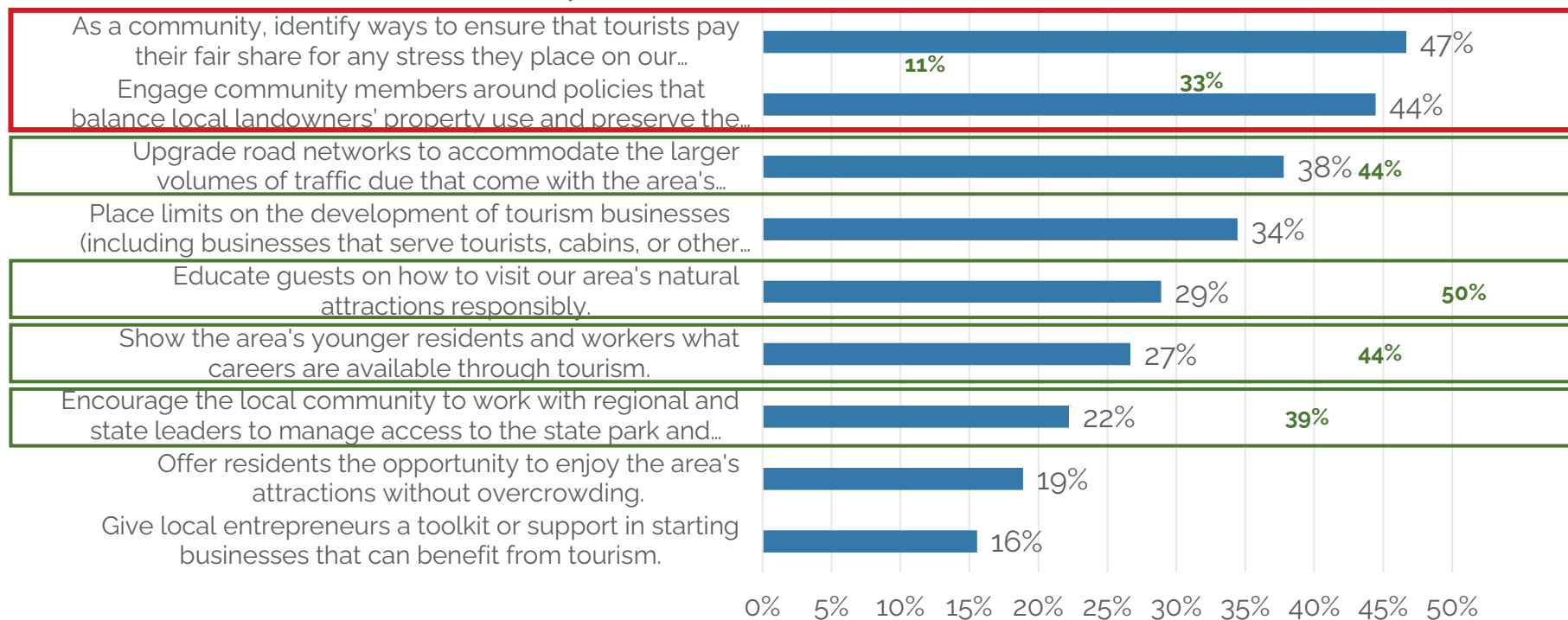
• Answered: 92
 Skipped: 61

Issues to Address

ALL RESPONDENTS

ACCOMMODATIONS ONLY

Q15: What are the three most important issues that need to be addressed in the next ten years to ensure the Hocking Hills area remains a rewarding place to live and visit? (choose up to three)



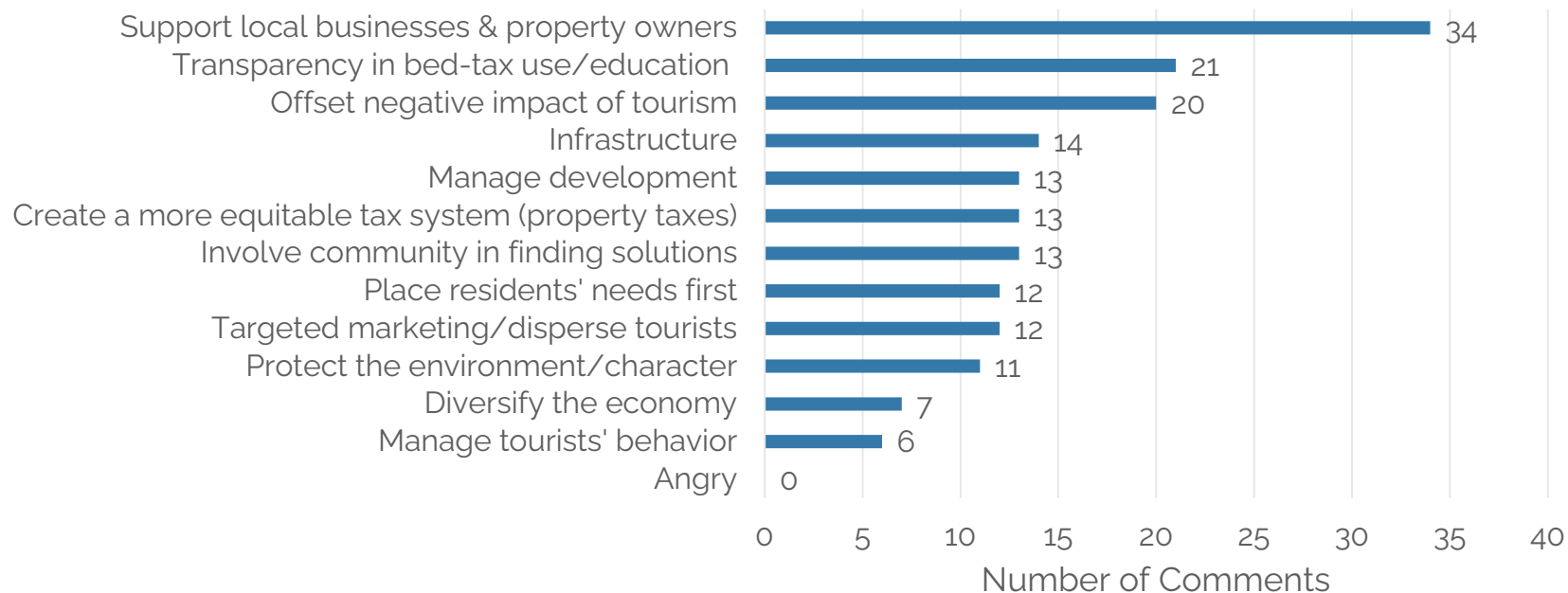
- Answered: 90
- Skipped: 63

“One thing...”

ALL RESPONDENTS

Q16: What one thing would you want the Hocking Hills Tourism Association to consider when they are building the Tourism Stewardship Plan?

Response Themes



- Answered: 70
Skipped: 83

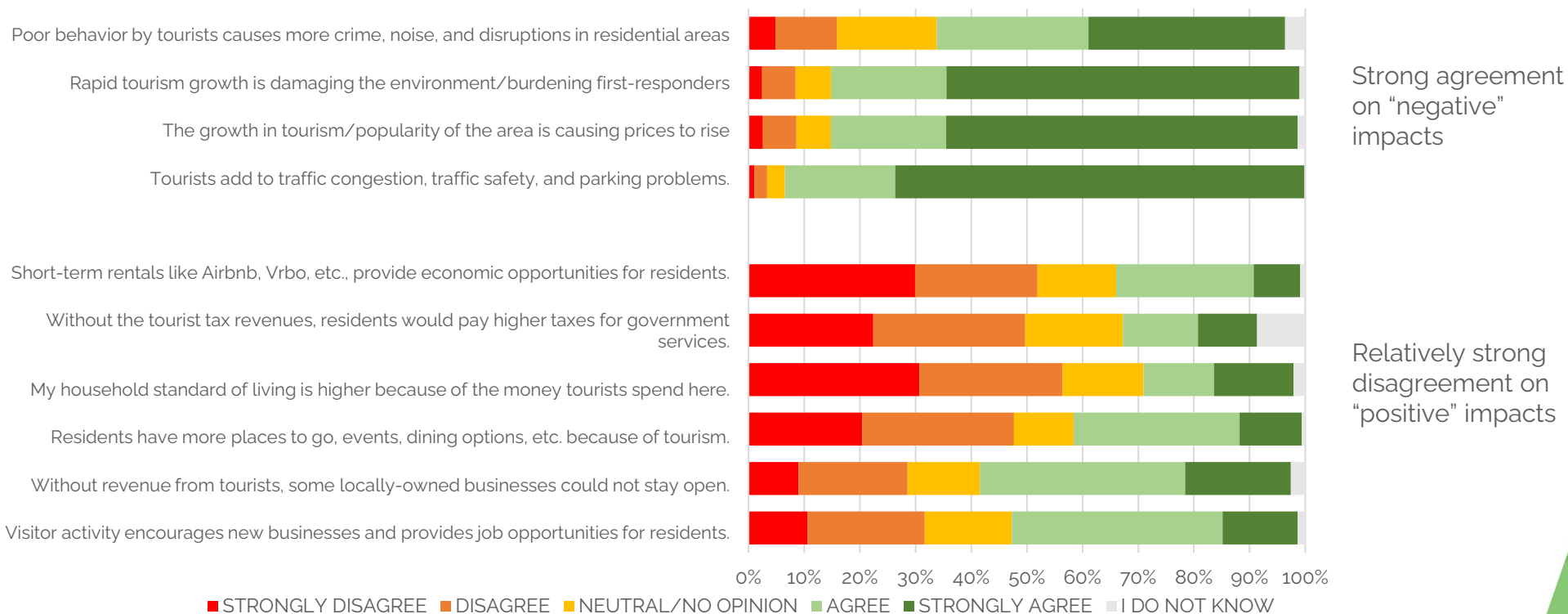
Resident Survey Results

732 complete responses (online and paper)

Effects of Visitor Economy

RESIDENTS

Q1: We know that the visitor economy affects our community in different ways. Please indicate your level of agreement with the following statements:



Issues to Address

RESIDENTS

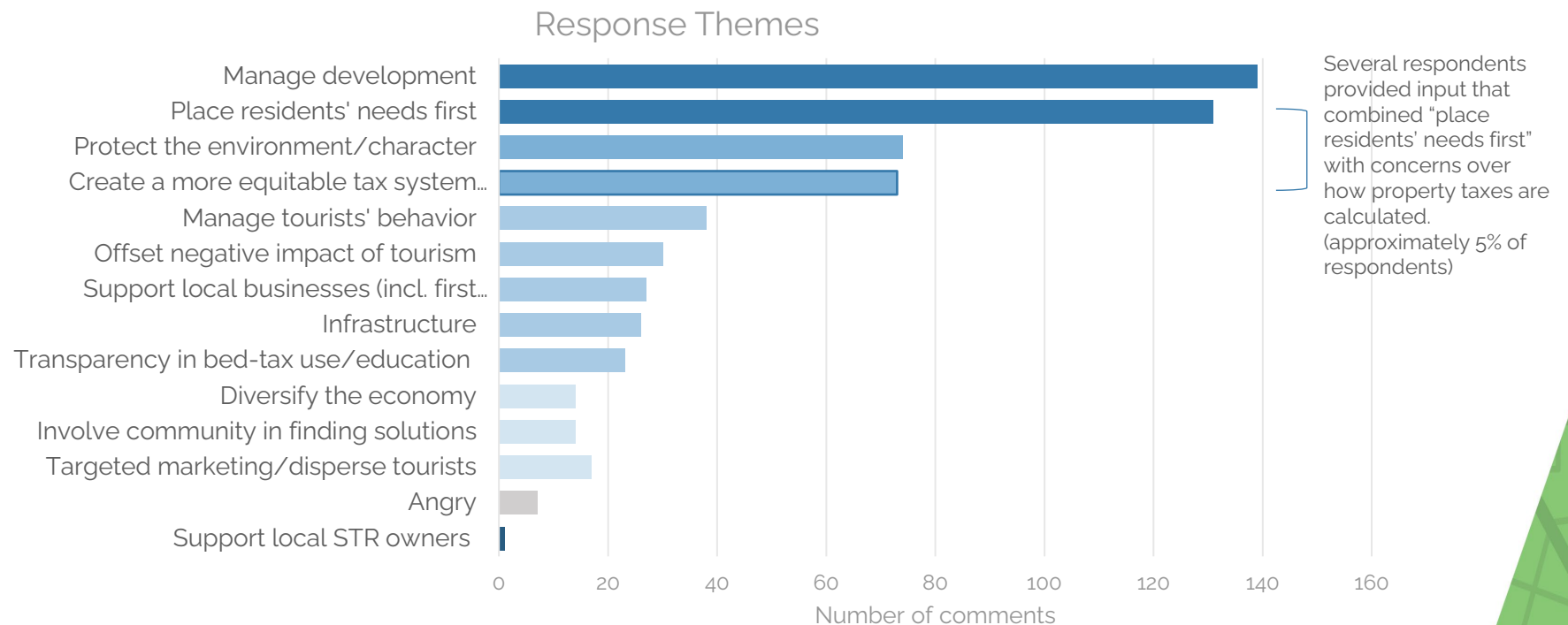
Q2: What are the three most important issues that need to be addressed in the next ten years to ensure the Hocking Hills area remains a rewarding place to live and visit? (choose up to three)



“One thing...”

RESIDENTS

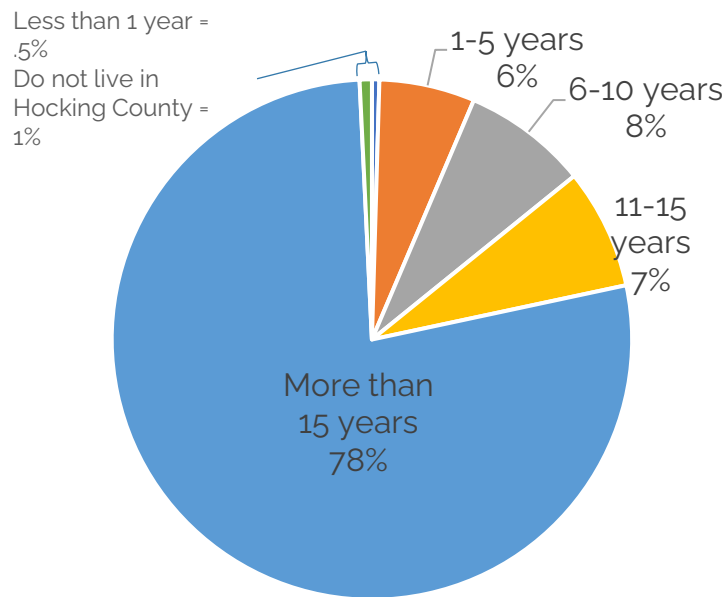
Q3: What one thing would you want the Hocking Hills Tourism Association to consider when they are building the Tourism Stewardship Plan?



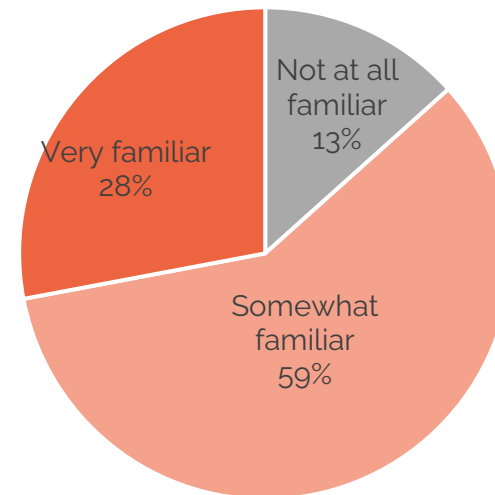
Who Responded

RESIDENTS

Q4: How long have you lived in the Hocking Hills area?



Q5: How familiar are you with the Hocking Hills Tourism Association?



Q6: Do you or any of your family members work in the hospitality and tourism industry in Hocking County? 27% Answered "yes"

Survey Results Snapshot

Stakeholder Survey Results: 153 responses

Resident Survey Results: 695 complete responses

Green = Actions within HHTA's purview

What are the three most important issues that need to be addressed in the next ten years to ensure the Hocking Hills area remains a rewarding place to live and visit?

Stakeholders:

1. As a community, identify ways to ensure that tourists pay their fair share for any stress they place on our infrastructure - 47% **[HHTA – Education and transparency around taxes]**
2. Engage community members around policies that balance local landowners' property use and preserve the area's character - 44%
3. Upgrade road networks to accommodate the larger volumes of traffic due that come with the area's popularity - 38%

Residents:

1. Place limits on the development of tourism businesses - 65%
2. Identify ways to ensure that tourists pay their fair share for stress they place on infrastructure - 56% **[HHTA – Education and transparency around taxes]**
3. Engage community members to balance property use and preserving the area's character - 36%

What one thing would you want the Hocking Hills Tourism Association to consider when they are building the Tourism Stewardship Plan?

Stakeholders:

1. **Support local businesses & property owners**
2. **Transparency in bed-tax use/education**
3. Offset negative impact of tourism **[HHTA – In collaboration with other local entities]**

Residents:

1. Manage development
2. Place residents' needs first
3. Protect the environment/character

Survey Results Snapshot

Effects of Visitor Economy

Green = Actions within HHTA's purview

Statement	% of Stakeholders Agree	% of Residents Agree
Tourists add to traffic congestion, traffic safety, and parking problems in the Hocking Hills.	70	90
The growth in tourism and the popularity of the Hocking Hills area are causing prices to rise, making things less affordable for residents.	50	85
The rapid growth of tourism is damaging our natural environment and places an undue burden on ambulance, public safety, and fire first-responders.	50	85
Poor behavior by tourists has caused increased crime, noise levels, and disruptions in residential areas.	35	70
Without revenue from tourists, some locally-owned businesses could not stay open.	85	60
Visitor activity encourages new businesses to the area and provides job opportunities for residents.	85	50
Residents have more places to go, events to attend, dining options, and things to do because of tourism.	75	40
My household standard of living is higher because of the money tourists spend here.	50	30
Without the tax revenues from tourists, we would have to pay higher taxes for government programs and services.	40	25
Short-term rentals like Airbnb, Vrbo, etc., provide economic opportunities for residents.	55	35

Stakeholders – Business Concerns over Next 12 Months:

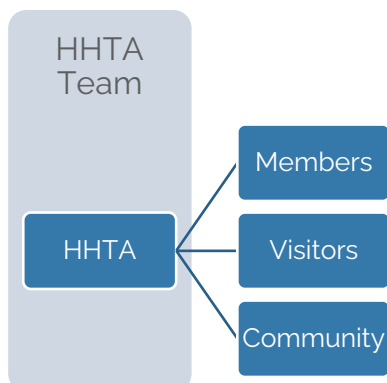
1. Rising costs of supplies - 30%
2. Increases in property taxes - 25%
3. **Resident sentiment and attitude towards tourism - 23%**

Stakeholders – Priorities for HHTA Over Next 12 Months:

1. **Establish tourism stewardship priorities and programs to protect quality of life in the Hocking Hills - 33%**
2. Strengthen the charm and appeal of downtown Logan - 33%
[HHTA – Possible role in collaboration with local entities]
3. **Build local awareness of the value of tourism - 32%**

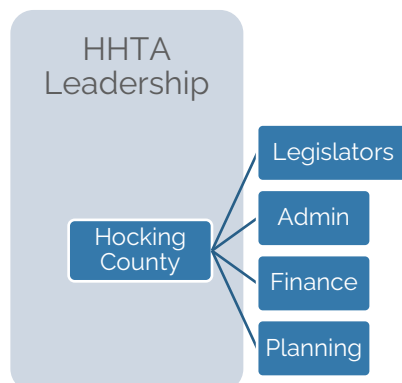
Format for Direction

Audience to Action



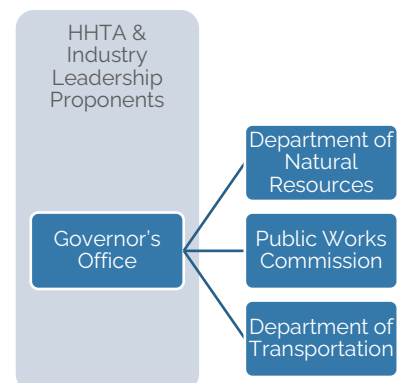
Invest, Lead, & Program

Needs:
Desired Outcomes:
Project Deadlines:



Advocate & Support

Needs:
Desired Outcomes:
Project Deadlines:



Advocate & Justify

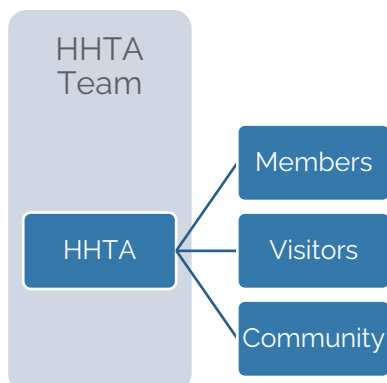
Needs:
Desired Outcomes:
Project Deadlines:

PREPARING FOR COMMUNICATIONS



Data Highlights Story Telling Opportunities

Audience to Action



Invest, Lead, & Program

Needs:

Desired Outcomes:

Project Deadlines:

- Educate Locals (Stakeholders and Residents) on **HHTA's Contributions**
- Educate Residents on the **Value of Tourism to Economy & to Neighbors' Livelihoods**
- Address Locals' Perceptions around **Future of the Hocking Hills**
- Address Locals' Perceptions of **Impact of Tourism**
- Educate Guests on **How to Visit Natural Attractions Responsibly**

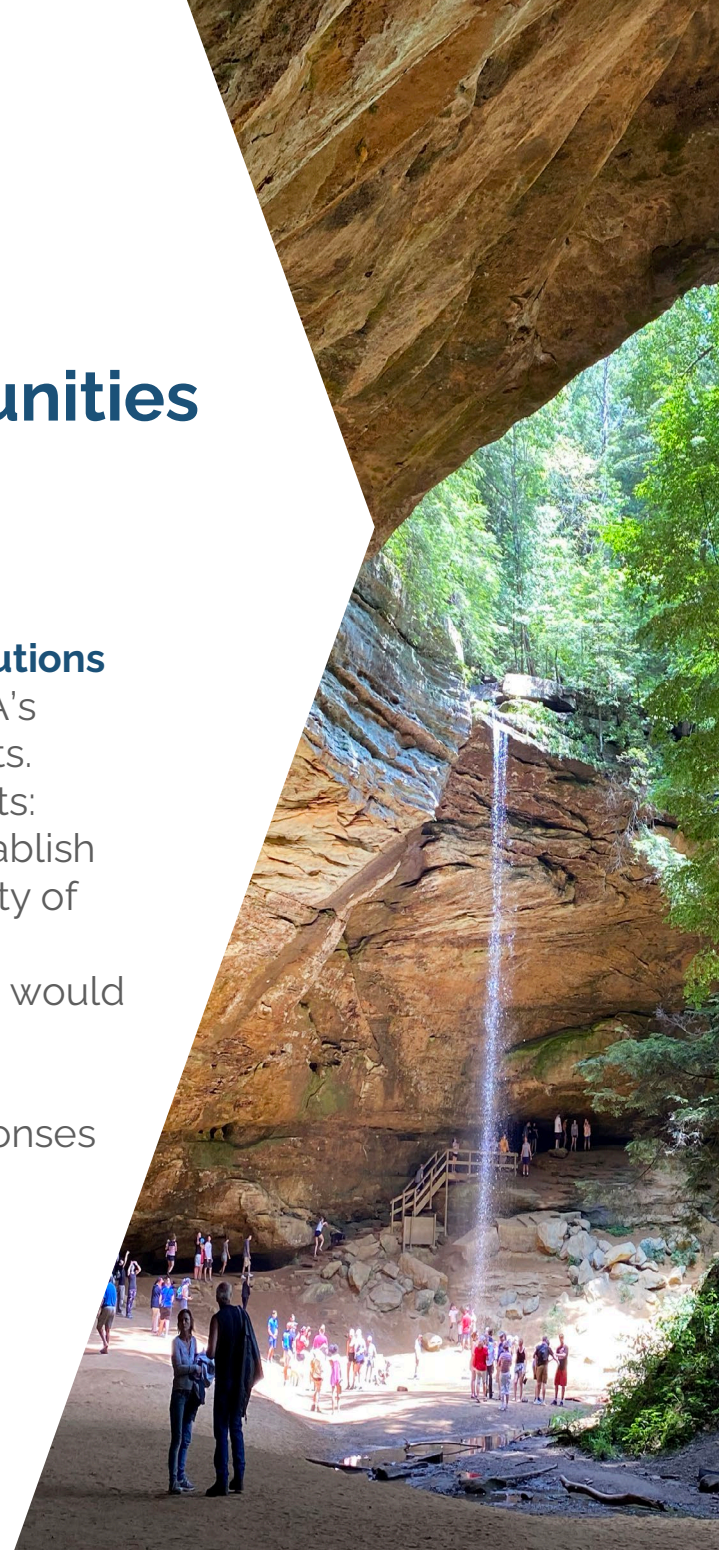


Data Highlights Story Telling Opportunities

Audience to Action

Educate Locals (Stakeholders and Residents) on HHTA's Contributions

- Over half of tourism stakeholders are not fully familiar with HHTA's efforts to market the area and HHTA's tourism stewardship efforts.
- Other survey results show lack of understanding of HHTA's efforts:
 - Stakeholders' #1 priority for HHTA in the coming year is "Establish tourism stewardship priorities and programs to protect quality of life in the Hocking Hills."
 - Stakeholders may not be aware of current programs and/or would like more programs.
 - Is there confusion with HockingHills.com?
- Place residents' needs first - Resident priority #2 in write-in responses for one thing for HHTA to consider when building the Tourism Stewardship Plan



Data Highlights Story Telling Opportunities

Audience to Action

Educate Residents on the Value of Tourism to Economy and to Neighbors' Livelihoods

- Resident sentiment and attitude towards tourism = Stakeholder concern #3
- Build local awareness of the value of tourism = Stakeholder priority #3 for HHTA in the coming year
- Offset negative impact of tourism = Stakeholder priority #3 in write-in responses for one thing for HHTA to consider when building the Tourism Stewardship Plan.
- Address value of tourism and perceptions around seasonality and Bigfoot Festival
- Both stakeholder and resident surveys highlight the opportunity for education on:
 - Tourism as the underpinning for the local economy
 - How tourism tax revenues benefit residents



Data Highlights Story Telling Opportunities

Audience to Action

Address Locals' Perceptions of Impact of Tourism

- Both stakeholder and resident surveys highlight the opportunity, if data is available, to right-size concerns about tourism's impact in several areas:
 - Traffic congestion
 - First responders / public safety
 - The environment
 - Crime and noise levels



Data Highlights Story Telling Opportunities

Audience to Action

Address Locals' Perceptions around Future of the Hocking Hills

- Address concerns around the Hocking Hills as Pigeon Forge / Gatlinburg
- Share examples of Fredericksburg, TX and Sedona, AZ
- Communicate ways that HHTA's leadership and community involvement can steer the Hocking Hills toward a sustainable future

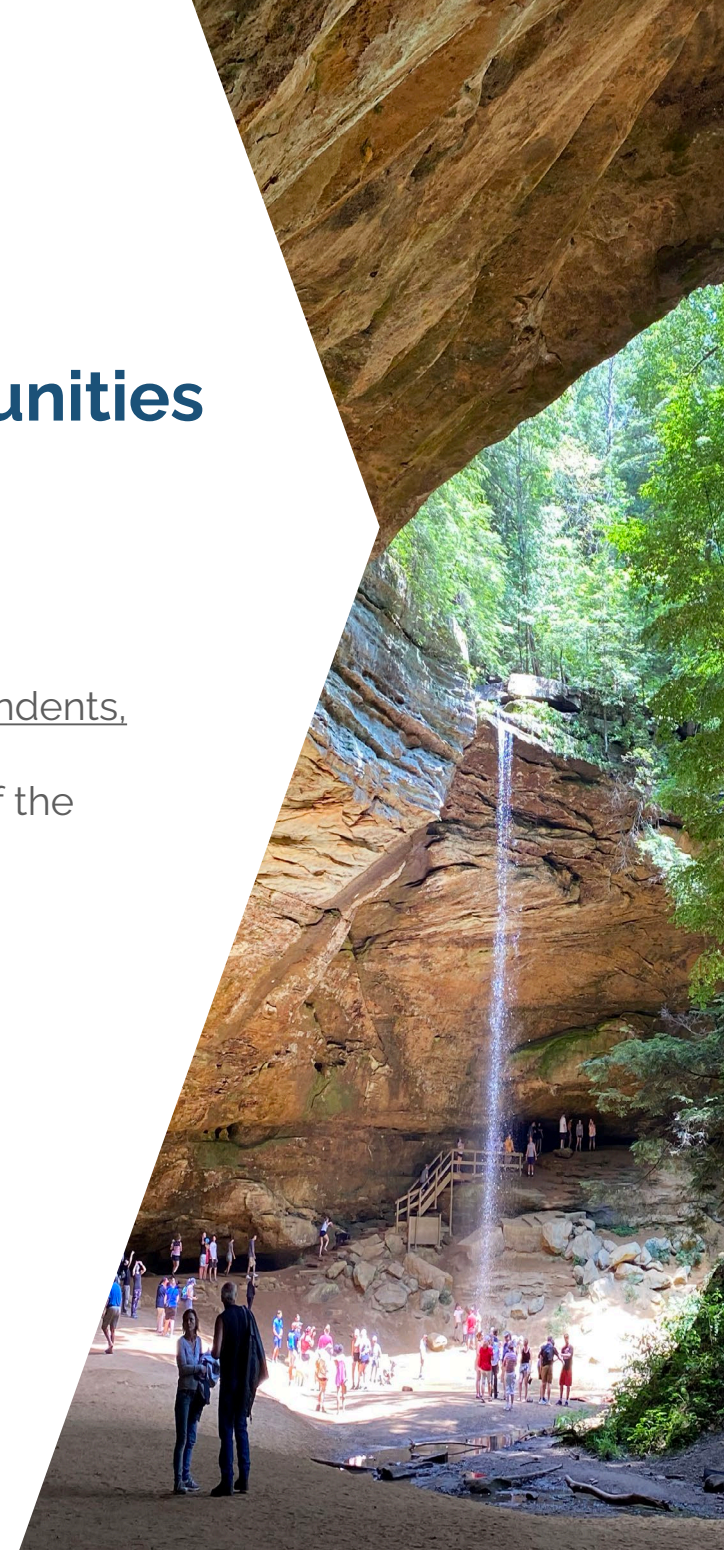


Data Highlights Story Telling Opportunities

Audience to Action

Educate Guests on How to Visit Natural Attractions Responsibly

- Stakeholders (29%), including 50% of all Accommodations respondents, and residents (26%) named this as a top issue to address.
- Current and anticipated HHTA stewardship efforts can be part of the education effort.



Options for Engagement

Week of May 7-9

Seminar/Workshop Concepts

- Multiple sessions by topics
 - Community Capacity
 - Benchmarking other communities
 - Infrastructure Support
 - Role of Policy
 - Visitor Profile
 - Visitation and the environment
 - Stewardship Summary
 - Input for recommendations
- Recommendations Review with HHTA
- Implementation Meetings



Thank You!

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Tammy Koerte – tkoerte@longwoods-intl.com